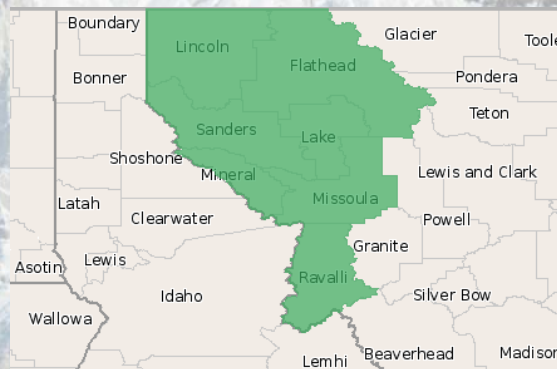


# Western Montana Regional Asset Map



**Sponsored by Montana Department of Labor & Industry  
For Montana's Region 1 Regional Innovation Grant**



***Report prepared by:***



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EMSI provides economic data, analysis, and forecasting consulting services to workforce, education, and economic development professionals throughout the nation. Since 1995, EMSI has delivered validated high quality, cost effective services that promote economic growth, institutional change, and intelligent use of human, physical, and financial resources.

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# Introduction

Asset mapping is a critical step in organizing the resources that a community can leverage to support integrated workforce and economic development initiatives. This asset map will provide leaders and decision makers with an inventory of key resources that can be incorporated into a development effort.

Many interpretations of asset mapping exist in the applied literature focused around community development. Some explain asset maps as an inventory of the strengths and gifts of the people who make up a community. Others describe asset maps as the tangible and intangible resources of a community. One common theme that exists in every explanation is that asset mapping uses a positive based approach to identifying certain community characteristics. The goal of asset maps is to display to community stakeholders what components exist in their community in order to create a foundation for community development.

This asset study focuses on a seven-county region in western Montana, including the Counties Lincoln, Flathead, Lake, Mineral, Sanders, Missoula and Ravalli. The following are the components and questions that will be addressed:

- Population Characteristics
  - Which areas are experiencing population growths, especially among the young to mid career age cohorts?
  - Which areas have the highest concentration of residents with a college degree?
- Economic Indicators
  - Which areas are people migrating into and which areas are they leaving?
  - Which areas are the most affordable?
  - Which areas have the highest earnings per worker?
  - Which areas are innovating as indicated by patent generation?
- Financial Capital
  - Which areas have financial capital that could be used to support new business ventures?
- Infrastructure
  - Which areas have the communications infrastructure to support high tech industries?
  - Which areas have a well integrated transportation infrastructure to support industries that require the movement of goods?
- Industry Characteristics
  - Which areas have a growing industrial base that could be expanded further or built upon to attract new industries?
- Workforce Competencies
  - Which areas employ a strong workforce especially in Production, Tourism, Business and Healthcare occupations?
  - Which areas have high-demand skills embedded in the workforce?
- Educational Output
  - Which areas have post-secondary educational institutions?
  - Which areas have a large number of graduates in Management, Production, Business and Financial Operations, Computer Science and Engineering fields?

The results of this study should be used by stakeholders to understand regional assets.

Development strategies that leverage existing resources have a greater success rate and overall return on investment for the community.

## ***Key Terms and Concepts***

### **Demographics Data**

- Population: 2007 population data based on moving Census Bureau Annual Estimates forward (see 5 Year Growth).
- 5 Year Growth: Demographic projections are constructed by trending historical Census Bureau Annual Estimates, birth rates, death rates, migration patterns, and job growth.
- Percent Change: Total change divided by start year population.
- Educational Attainment: Educational attainment data from the decennial census and the annual Current Population Statistics—both from the U.S. Census Bureau—are combined with EMSI demographics data to create past, current, and projected educational attainment data by gender, race, and ethnicity for all residents age 25 and up. For each county, the educational attainment (EA) by gender is projected out into the future. This is done by looking at the decennial census data from 1990 and 2000.

### **Economic Indicators Data**

- In/Out-Migration: Internal Revenue Service, Statistics of Income Division, County-to-County Migration Data.
- Median Rent: U.S. Department of Housing and Urban Development, Office of Policy Development and Research, 50th Percentile Rent Estimates.
- Patents: U.S. Patent and Trademark Office.

### **Industry Data**

- NAICS Code & Name: The standard numerical code and name of industries. These codes are used in all state and federal industry data collection.
- Jobs: The total number of jobs, full- and part-time, in the industry. Includes both payroll workers and proprietors, as well as estimates in place of non disclosable (or “suppressed”) data points in published data. Projections are based on historical trends and state and federal published ten-year projections.
- 5 Year Growth: Change in total jobs over the given timeframe.
- Percent Change: Total change divided by start year jobs.
- EPW (Earnings Per Worker): Total industry earnings (earnings of all businesses in the industry) divided by the number of jobs in the industry. This is *not* equivalent to the industry’s “average worker wages.” For worker wages, see occupational earnings.

### **Shift Share**

- Industrial Mix Effect: The number of jobs expected to be added or removed from a regional industry/occupation if it followed the national industry-specific job growth rate.
- National Growth Effect: The number of jobs expected to be added to the industry/occupation based on total national economic job growth.
- Expected Change: The sum of the mix and national growth effects.
- Competitive Effect: The industry/occupation’s change in jobs over the given timeframe minus the expected change. This indicates how growth at the regional level compares to expected growth using national trends. A positive competitive effect is associated with a rising location quotient (see below).

- See Appendix B for more detail

### **Location Quotient (LQ)**

- LQ: The relative concentration of the industry/occupation/demographic/competency in the region, or in other words, a measure of the region's specialization in the selected component. LQ is defined as the percent share of an industry/ occupation/demographic/competency in the regional economy divided by the percent share of the same component in the national economy. High-LQ components tend to indicate regional specialties or strengths unique to the region.
- % Change in LQ: This indicates whether the component is increasing or decreasing its concentration in the regional economy relative to the national economy. It is defined as the difference between the end year and start year LQ, divided by the start year LQ.
- See Appendix B for more detail

### **Occupation Data**

- SOC Code & Title: The standard numerical code and occupation title used in state and federal data collection.
- Jobs: Total number of jobs in the occupation. In future years, this number is a projection based on both historical trends and on state and federal ten-year projections.
- 5 Year Growth: Total change in jobs over the given timeframe.
- Percent Change: Total change divided by start year jobs.
- Hourly Earnings: The median hourly earnings of all regional workers in the occupation.

### **Programs Data**

- Completions: Number of students to complete a given program in the most recent data year. These numbers are reported by individual institutions and come directly from the federal IPEDS database.

## ***Executive Summary***

The seven-county region is comprised of Lincoln, Flathead, Sanders, Lake, Mineral, Missoula, and Ravalli counties. The largest city in the region is Missoula, home to the University of Montana.

The asset map produced for the Western Montana region focuses on seven counties, specifically: Lincoln, Flathead, Sanders, Lake, Mineral, Missoula and Ravalli counties. Throughout the asset mapping process, several positive economic and demographic characteristics were identified, highlighting the educational, occupational and industrial atmosphere of Western Montana.

Overarching themes from the asset map show a “corridor” effect between Flathead, Lake, Missoula and Ravalli counties. This effect economically ties the four counties together in almost every major industry sector. Additionally, specific spillover and/or concurrent effects on appear to be occurring in the Lincoln, Sanders and Mineral counties. These effects are especially apparent in the natural resource and transportation/warehousing industry sectors. When taken as a whole, the seven-county region shows noteworthy economic linkages that if leveraged properly can help the region to grow and diversify.

Overall trends and characteristics are highlighted in four major categories, namely: demographics, industry, occupation and educational attainment. Each category provides an alternate viewpoint of the region that seeks to promote widespread understanding of the regional economy.

Specific highlights from each category are as follows:

### **Demographic**

- A five year projected regional population growth of almost 11,000 residents. Of this over half of the growth is in the late-career cohort (ages 50 to 65). This indicates that the region will have a more experienced workforce over the next five years.
- The region shows a healthy concentration of the emerging workforce age cohort, which will be able to replace a portion of the retiring workforce.
- There has been a net in-migration of over 8,200 residents to the region between 2004 and 2006. This in-migration signifies the ability for the region to draw in new residents instead of leaking out current residents.

### **Industry**

- The region produces a high proportion of patents (a measurement of innovation) when compared to the state. The majority of these patents stem from Semitool, Inc. in Flathead County.
- Strong growth in the financial industry sectors is expected over the next five years
- There is a strong concentration of timber companies and wood product manufacturing companies throughout the region.
- The health care is expected to grow significantly over the next five years, adding over 2,500 new jobs.
- Additionally, professional and technical services are expected to see growth over the next five years, which will significantly increase the appeal of the region to other growing industries.



## **Occupation**

- Several occupation categories are showing considerable growth over the next five years. The, noteworthy occupations are sales and sales related; office and administrative support; transportation; education; health care and engineering.
- Unemployment in the region has historically been around one percent lower than the national average, indicating strong employment. Montana, as of June 2008, ranked 15<sup>th</sup> out of all the states for lowest unemployment.
- From the above occupations, education in particular shows a significant percentage growth (10%) in post secondary teachers, thus adding to the competitive abilities of Western Montana's educational system.
- Health care occupations, especially registered nurses) are also expected to significantly increase over the next five years, adding roughly 920 new jobs to the region.

## **Educational Output/Attainment**

- Educational output for much of the region shows high graduation rates for high schools, when compared to national averages.
- Of the higher education institution enrollment in the Fall of 2007, only 26% of the students needed some form of remediation classes.
- The growth rate of college degree attainment for the 25+ year old population is expected to exceed 10% over the next five years, totaling over 6,700 additional educated workers.

When viewed as a whole, the seven-county Western Montana region has several integral assets that can be used to promote economic development and growth. The highlighted assets and the assets and characteristics contained in the report provide business recruiters, economic development corporations and decision-makers with key information about their region.

# Population Characteristics

This section is broken into three components. The entire workforce population encompasses the 15-64 year old age bracket. Early to Mid Career covers the 15-49 year old age bracket and Late Career includes the 50-64 year old age bracket. Within these population brackets there are widely different characteristics. Early to Mid Career people are the best indicator of workforce potential because they are at the prime age to receive education and they have a long period of working years ahead of them.

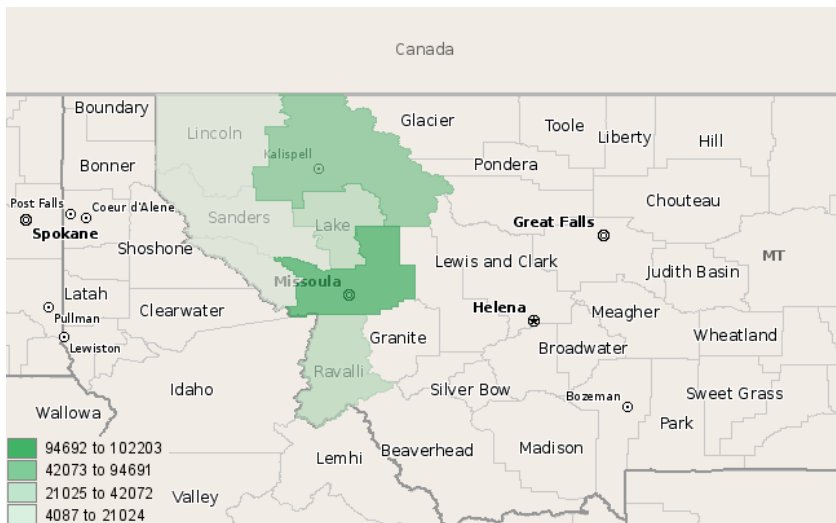
Educational attainment of the existing population indicates the overall intelligence of the workforce and gives some further insight into capabilities or trainability. Populations with higher levels of education generally create a greater potential for innovation, and often make the region more attractive to new companies. The data displays the percent of the population 25 years and older that has at least a college degree.

## *Section Summary*

- The Western Montana region makes up 31% of the state population, but is projected to contribute 55% of the state's growth over the next 5 years.
- Six of the ten highest growth Counties in Montana are located in the Western Montana region.
- The region's largest overall population growth is occurring in Flathead and Ravalli Counties, despite the fact that Missoula has a larger population.
- The Early to Mid Career population is projected to decline in the region at a slower rate than the national average, and Ravalli and Flathead Counties are both projected to see an over 2% increase.
- The region has a slightly lower than average concentration of people under 15 years old, and a slightly higher than average concentration of people age 45-64. This could result in a workforce shortage in the next two decades.
- Growth in the Late Career cohorts is particularly strong in Missoula and Flathead Counties. Late Career workers are more experienced but can pose a potential threat because of impending retirement.
- The region is projected to see a 10% increase in degree holding individuals, which is higher than the state and national averages of 9% and 7% respectively.
- Flathead County is projected to see an over 13% increase in degree holding individuals, which is the largest by percentage and size.

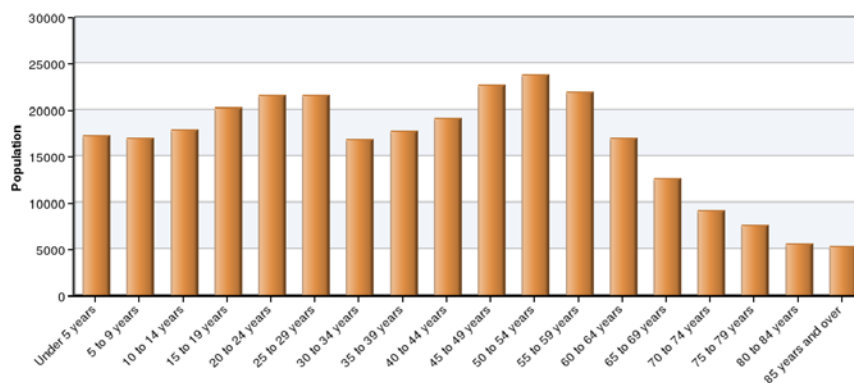
# Total Population

## Most Populous Counties



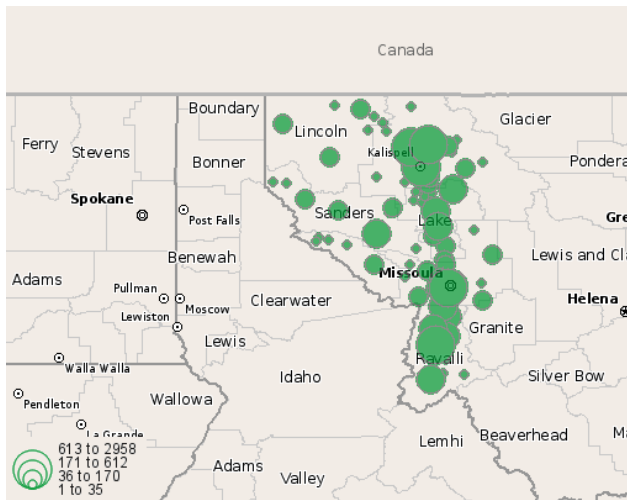
| County               | 2007 Pop |
|----------------------|----------|
| Missoula, MT (30063) | 102,203  |
| Flathead, MT (30029) | 87,181   |
| Ravalli, MT (30081)  | 41,427   |
| Lake, MT (30047)     | 28,979   |
| Lincoln, MT (30053)  | 19,326   |
| Sanders, MT (30089)  | 11,305   |
| Mineral, MT (30061)  | 4,087    |
| Montana              | 951,849  |

## Population by Age Cohort



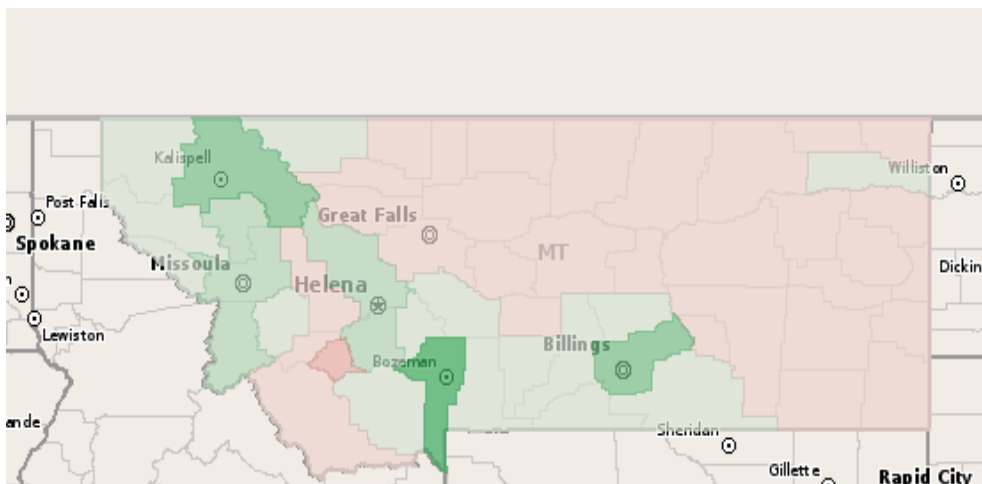
| Age      | 2007 Population | 2007 LQ |
|----------|-----------------|---------|
| under 15 | 52,027          | 0.88    |
| 15 - 24  | 41,845          | 1.01    |
| 25 - 44  | 75,130          | 0.92    |
| 45 - 64  | 85,339          | 1.14    |
| 65+      | 40,167          | 1.09    |
|          | 294,508         |         |

## Growth



| County               | 2007 Pop. | 5 Year Growth | % Growth |
|----------------------|-----------|---------------|----------|
| Flathead, MT (30029) | 87,181    | 5,689         | 7%       |
| Missoula, MT (30063) | 102,203   | 2,896         | 3%       |
| Ravalli, MT (30081)  | 41,427    | 2,511         | 6%       |
| Lake, MT (30047)     | 28,979    | 1,150         | 4%       |
| Sanders, MT (30089)  | 11,305    | 493           | 4%       |
| Lincoln, MT (30053)  | 19,326    | 307           | 2%       |
| Mineral, MT (30061)  | 4,087     | 103           | 3%       |
| Western Montana      | 294,508   | 13,146        | 4%       |
| Montana              | 951,849   | 23,811        | 3%       |
| Nation               | 302,193k  | 10,950k       | 4%       |

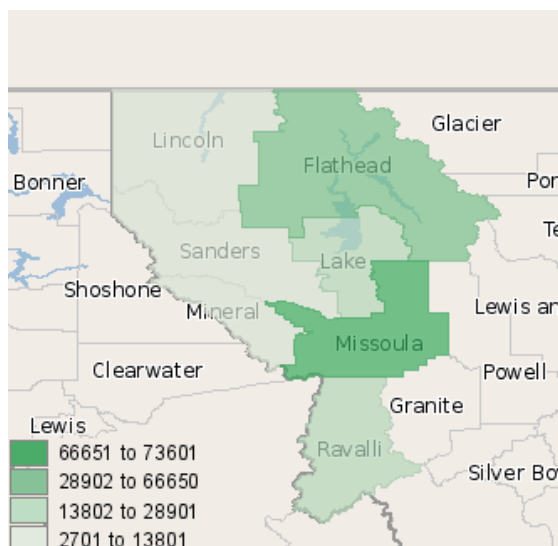
## Montana's Highest Growth Counties



| County                      | 2007 Pop. | 5 Year Growth | % Growth |
|-----------------------------|-----------|---------------|----------|
| Gallatin, MT (30031)        | 82,990    | 6,871         | 8%       |
| Flathead, MT (30029)        | 87,181    | 5,689         | 7%       |
| Yellowstone, MT (30111)     | 139,812   | 4,971         | 4%       |
| Missoula, MT (30063)        | 102,203   | 2,896         | 3%       |
| Ravalli, MT (30081)         | 41,427    | 2,511         | 6%       |
| Lewis and Clark, MT (30049) | 59,892    | 1,874         | 3%       |
| Lake, MT (30047)            | 28,979    | 1,150         | 4%       |
| Jefferson, MT (30043)       | 11,483    | 675           | 6%       |
| Sanders, MT (30089)         | 11,305    | 493           | 4%       |
| Lincoln, MT (30053)         | 19,326    | 307           | 2%       |

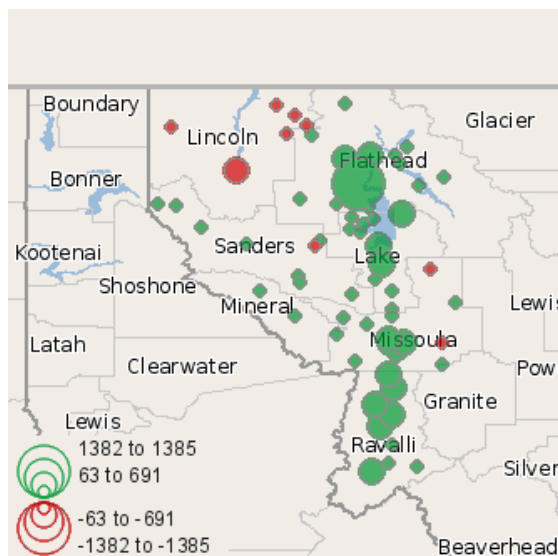
# Workforce Age Population, 15 to 64

## Most Concentrated Counties, 2007



| County               | 2007 Pop. | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 73,601    | 1.07    |
| Flathead, MT (30029) | 59,702    | 1.02    |
| Ravalli, MT (30081)  | 27,360    | 0.98    |
| Lake, MT (30047)     | 18,823    | 0.97    |
| Lincoln, MT (30053)  | 12,682    | 0.97    |
| Sanders, MT (30089)  | 7,444     | 0.98    |
| Mineral, MT (30061)  | 2,701     | 0.9     |
| Western Montana      | 202,314   | 1.02    |
| Montana              | 642,186   | 1.00    |
| Nation               | 204,397k  | --      |

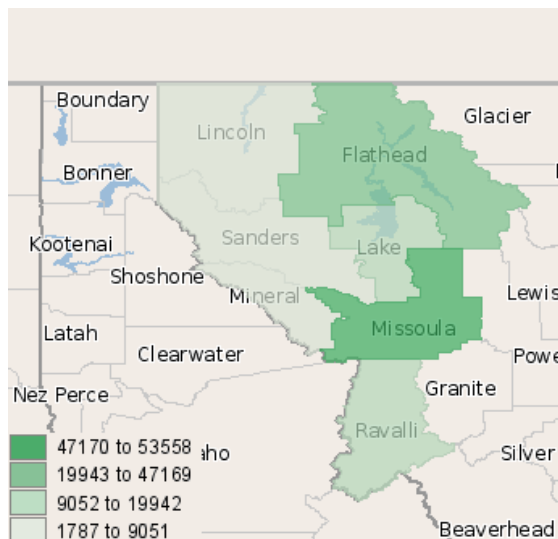
## Growth/Decline by County, 2007-2012



| County               | 2007 Pop. | 2012 Pop. | 5 Year Growth | % Growth |
|----------------------|-----------|-----------|---------------|----------|
| Flathead, MT (30029) | 59,702    | 62,451    | 2,749         | 5%       |
| Ravalli, MT (30081)  | 27,360    | 28,799    | 1,439         | 5%       |
| Missoula, MT (30063) | 73,601    | 74,004    | 403           | 1%       |
| Lake, MT (30047)     | 18,823    | 19,194    | 371           | 2%       |
| Sanders, MT (30089)  | 7,444     | 7,571     | 127           | 2%       |
| Mineral, MT (30061)  | 2,701     | 2,717     | 16            | 1%       |
| Lincoln, MT (30053)  | 12,682    | 12,534    | -148          | -1%      |
| Western Montana      | 202,313   | 207,270   | 4,957         | 2.5%     |
| Montana              | 642,186   | 648,142   | 5,956         | 0.9%     |
| United States        | 203,397k  | 209,562k  | 6,165k        | 3%       |

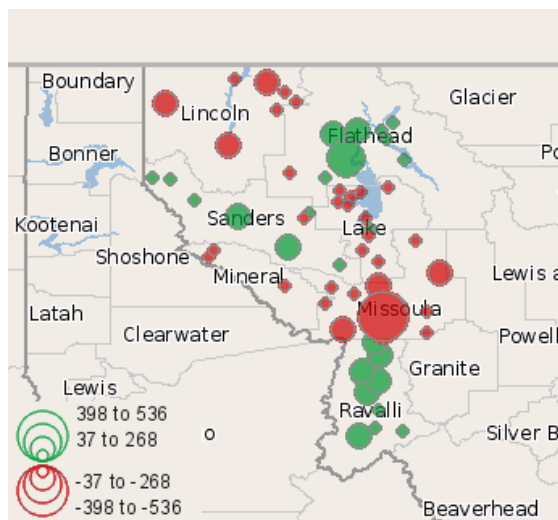
## Early- to Mid-Career Population, 15 to 49

### Most Concentrated Counties, 2007



| County               | 2007 Pop.   | 2007 LQ |
|----------------------|-------------|---------|
| Missoula, MT (30063) | 53,558      | 1.06    |
| Flathead, MT (30029) | 40,783      | 0.94    |
| Ravalli, MT (30081)  | 18,046      | 0.88    |
| Lake, MT (30047)     | 12,918      | 0.90    |
| Lincoln, MT (30053)  | 7,891       | 0.82    |
| Sanders, MT (30089)  | 4,619       | 0.83    |
| Mineral, MT (30061)  | 1,787       | 0.88    |
| Western Montana      | 139,601     | 0.96    |
| Montana              | 443,505     | 0.94    |
| United States        | 149,665,142 | --      |

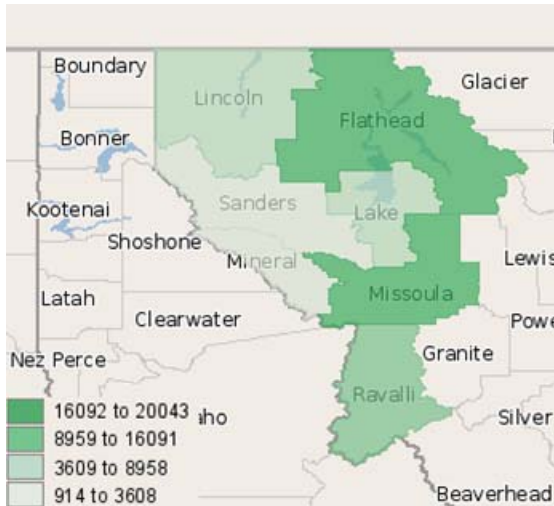
### Growth/Decline by County, 2007-2012



| County               | 2007 Pop. | 2012 Pop. | 5 Year Growth | % Growth |
|----------------------|-----------|-----------|---------------|----------|
| Ravalli, MT (30081)  | 18,046    | 18,784    | 738           | 4%       |
| Flathead, MT (30029) | 40,783    | 41,453    | 670           | 2%       |
| Sanders, MT (30089)  | 4,619     | 4,811     | 192           | 4%       |
| Mineral, MT (30061)  | 1,787     | 1,764     | -23           | -1%      |
| Lake, MT (30047)     | 12,918    | 12,869    | -49           | -0%      |
| Lincoln, MT (30053)  | 7,891     | 7,392     | -499          | -6%      |
| Missoula, MT (30063) | 53,558    | 51,698    | -1,860        | -3%      |
| Western Montana      | 139,601   | 138,770   | -831          | -0.6%    |
| Montana              | 443,505   | 426,383   | -17,122       | -3.8%    |
| United States        | 149,665k  | 149,026k  | -639,010      | -0.01%   |

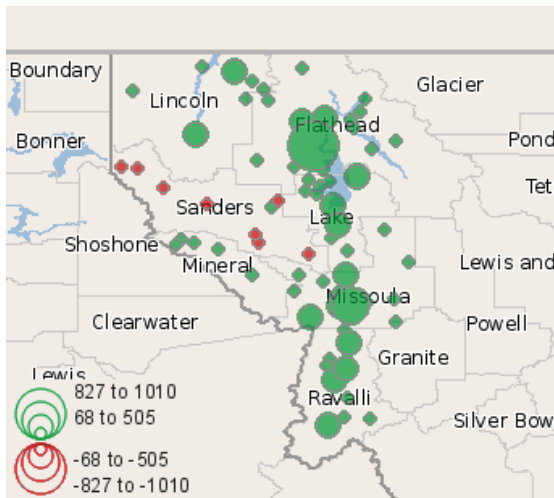
## Late-Career Population, 50 to 65

### Most Concentrated Counties, 2007



| County               | 2007 Pop. | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 20,043    | 1.10    |
| Flathead, MT (30029) | 18,919    | 1.22    |
| Ravalli, MT (30081)  | 9,314     | 1.26    |
| Lake, MT (30047)     | 5,906     | 1.15    |
| Lincoln, MT (30053)  | 4,792     | 1.39    |
| Sanders, MT (30089)  | 2,825     | 1.41    |
| Mineral, MT (30061)  | 914       | 1.26    |
| Western Montana      | 62,713    | 1.20    |
| Montana              | 198,681   | 1.17    |
| United States        | 53,732k   | --      |

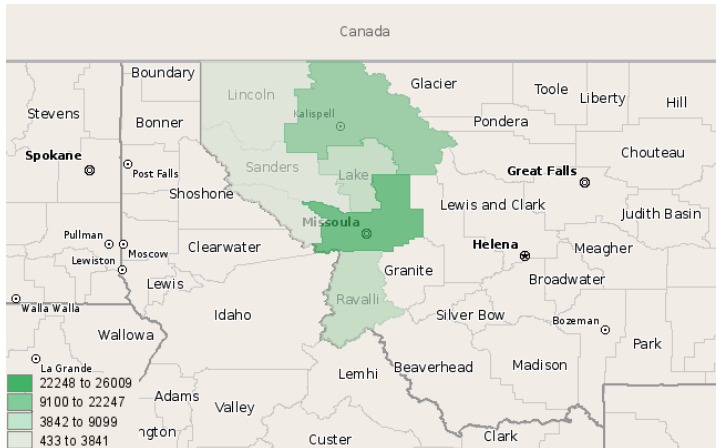
## Growth/Decline by County 2007-2012



| County               | 2007 Pop. | 2012 Pop. | 5 Year Growth | % Growth |
|----------------------|-----------|-----------|---------------|----------|
| Missoula, MT (30063) | 20,043    | 22,306    | 2,263         | 11%      |
| Flathead, MT (30029) | 18,919    | 20,998    | 2,079         | 11%      |
| Ravalli, MT (30081)  | 9,314     | 10,016    | 702           | 8%       |
| Lake, MT (30047)     | 5,906     | 6,324     | 418           | 7%       |
| Lincoln, MT (30053)  | 4,792     | 5,142     | 350           | 7%       |
| Mineral, MT (30061)  | 914       | 953       | 39            | 4%       |
| Sanders, MT (30089)  | 2,825     | 2,759     | -66           | -2%      |
| Western Montana      | 62,713    | 68,499    | 5,786         | 9%       |
| Montana              | 198,681   | 221,759   | 23,078        | 12%      |
| United States        | 53,732k   | 60,536k   | 6,804k        | 13%      |

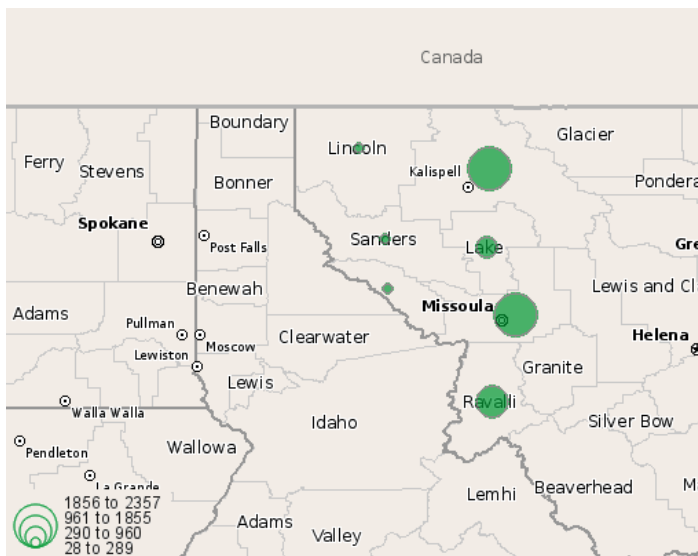
## Educational Attainment of Population 25+

### Highest Concentration of Population with College Degree



| County               | 2007 Pop. | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 26,009    | 1.11    |
| Flathead, MT (30029) | 18,486    | 0.89    |
| Ravalli, MT (30081)  | 8,435     | 0.84    |
| Lake, MT (30047)     | 5,765     | 0.87    |
| Lincoln, MT (30053)  | 2,762     | 0.57    |
| Sanders, MT (30089)  | 1,813     | 0.64    |
| Mineral, MT (30061)  | 433       | 0.43    |
| Western Montana      | 63,703    | 0.94    |
| Montana              | 203,876   | 0.95    |
| United States        | 69,013k   | --      |

### Percent Change in Population with College Degree



| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Flathead, MT (30029) | 2,357         | 13%      |
| Missoula, MT (30063) | 2,098         | 8%       |
| Ravalli, MT (30081)  | 1,114         | 13%      |
| Lake, MT (30047)     | 652           | 11%      |
| Lincoln, MT (30053)  | 268           | 10%      |
| Sanders, MT (30089)  | 213           | 12%      |
| Mineral, MT (30061)  | 28            | 6%       |
| Western Montana      | 6,730         | 10.6%    |
| Montana              | 17,842        | 8.75%    |
| United States        | 4,781k        | 6.9%     |



# Economic Indicators

Economic Indicators are designed for the needs of economic development professionals, policy researchers, and site selectors. They are key pieces of information that help to show the "pulse" of the region and allow for analysis of performance and projections of future performance. For the purposes of asset mapping, the indicators provided insight into the regional economy's ability to increase diversity and grow.

## *Section Summary*

- Unemployment in the region has historically been around one percent lower than the national average, indicating strong employment. Montana, as of June 2008, ranked 15<sup>th</sup> out of all the states for lowest unemployment.
- The region has experienced a total net in-migration of over 8,000 residents between 2004 and 2006. During this time period, population growth due to in-migration more than doubled the state average.
- Rental rates for housing exceed the state and national average for 3-bedroom units, though 1 bedroom units fall under the national average.
- Earnings in the region are roughly on average with state hourly earnings.
- Flathead County has an outstanding record for Patent generation, with over 300 in the past three years. This is also more than a third of the patents issued within Montana over the same time period.
- The research assets of both the University of Montana and private companies in Ravalli County provide the Western Montana with tremendous potential for research and development.
- Western Montana is maintaining a sufficient base of jobs to keep people from commuting elsewhere. 89% of regional residents work in the region, and 85% of workers in the area also reside in the region.
- Western Montana's Manufacturing and Visitor clusters are very strong. Ultimately, the money generated by these industries contributes more than 30% of the regional jobs and earnings.
- Western Montana contains a very strong railroad system, which makes it easier and more efficient to transport heavy goods, such as timber products.
- The major regional employers are involved in a diverse set of industries including advanced manufacturing, healthcare, wood products, retail, and professional services.

# Unemployment Rates

The Unemployment Rate measures the percent of people who are actively looking for a job that didn't find one in the past month or year. It is therefore a great indicator of the availability of jobs in the region.

Historically Montana has maintained one of the lowest unemployment rates in the country. Western Montana is typically around the same level as the rest of the state. Although the past two years have shown a slight increase in regional unemployment, Western Montana still consistently maintains a higher than average employment rate.

## Regional Unemployment, 2006-2008<sup>1</sup>

| County          | June 2008 <sup>2</sup> | Annual Average<br>2007 | Annual Average<br>2006 |
|-----------------|------------------------|------------------------|------------------------|
| Flathead, MT    | 4.4                    | 3.5                    | 3.6                    |
| Lincoln, MT     | 7.2                    | 6.7                    | 6.4                    |
| Missoula, MT    | 4.1                    | 3.0                    | 4.7                    |
| Lake, MT        | 5.6                    | 4.8                    | 4.6                    |
| Mineral, MT     | 5.2                    | 4.4                    | 3.0                    |
| Sanders, MT     | 6.8                    | 5.9                    | 5.0                    |
| Ravalli, MT     | 4.8                    | 4.0                    | 4.0                    |
| Western Montana | 4.7                    | 3.71                   | 3.26                   |
| Montana         | 4.1                    | 3.14                   | 3.69                   |
| Nation          | 5.5                    | 4.6                    | 4.6                    |

## Montana Historic Unemployment<sup>1</sup>

| Year                   | Rank<br>Among<br>States |
|------------------------|-------------------------|
| June 2008 <sup>3</sup> | 15                      |
| 2007                   | 8                       |
| 2006                   | 8                       |
| 2005                   | 8                       |
| 2004                   | 10                      |
| 2003                   | 7                       |

<sup>1</sup> Local Area Unemployment Statistics, Bureau of Labor Statistics, <http://data.bls.gov/PDQ/outside.jsp?survey=la>

<sup>2</sup> This column is not seasonally adjusted, which means that the data could represent a seasonal fluctuation and not a changing trend. Seasonally adjusted county level numbers are not available until the end of the calendar year.

<sup>3</sup> The state level numbers are seasonally adjusted; therefore the data does represent a changing trend in unemployment.

# Migration Data

## Regional Migration<sup>4</sup>

This analysis includes migration data for the region and each county individually. The regional data indicates that a large factor in the recent population growth in Western Montana is due to in-migration. It is also apparent that there is a transaction of people occurring between this region and the Billings and Great Falls areas, but neither region is gaining or losing a high number of people.

In terms of county Migration, Flathead County gained the most population from migration within the given time period. Ravalli and Missoula come in second and third place, respectively. In terms of percentage growth due to migration, Sanders and Flathead are the leaders.

### 2004- 2006 Regional Migration

|                       | 2004   | 2005   | 2006   | Total  |
|-----------------------|--------|--------|--------|--------|
| In-Migration          | 16,349 | 16,424 | 17,147 | 49,920 |
| Out-Migration         | 13,794 | 13,801 | 14,038 | 41,633 |
| Net Migration         | 2,555  | 2,623  | 3,109  | 8,287  |
| Percent of Population | 0.91%  | 0.92%  | 1.07%  | 2.95%  |

### Montana State-Wide Migration

|                       | 2004   | 2005   | 2006   | Total   |
|-----------------------|--------|--------|--------|---------|
| In-Migration          | 50,158 | 51,276 | 53,200 | 154,634 |
| Out-Migration         | 45,361 | 46,874 | 47,725 | 137,960 |
| Net Migration         | 4,797  | 4,402  | 5,475  | 14,674  |
| Percent of Population | 0.52%  | 0.47%  | 0.58%  | 1.55%   |

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<sup>4</sup> Internal Revenue Service, SOI Tax Stats- County-to-County Migration Data. 2004-2006, <http://www.irs.gov/taxstats/indtaxstats/article/0,,id=96816,00.html>

## Top Migratory Regions 2004-2006

These panels show highest ranking counties for in-migration and out-migration between 2004-2006.

### In-Migration

The in-migration table shows the counties from which the region is gaining its population

| County          | 2004-2006<br>Migrants |
|-----------------|-----------------------|
| Cascade, MT     | 1,069                 |
| Yellowstone, MT | 926                   |
| Gallatin, MT    | 933                   |

### Out-Migration

The out-migration table shows the counties into which the region is losing its population.

| County              | 2004-2006<br>Migrants |
|---------------------|-----------------------|
| Gallatin, MT        | 1,161                 |
| Lewis and Clark, MT | 920                   |
| Yellowstone, MT     | 889                   |

## County-by-County Migration

### County-by-County In-Migration

This County-by-County Migration table shows the total number of in-migrants to each county.

| County               | 2004 In-Migration | 2005 In-Migration | 2006 In-migration |
|----------------------|-------------------|-------------------|-------------------|
| Missoula, MT (30063) | 5,789             | 5,854             | 6,130             |
| Flathead, MT (30029) | 4,506             | 4,716             | 5,004             |
| Ravalli, MT (30081)  | 2,382             | 2,423             | 2,524             |
| Lake, MT (30047)     | 1,427             | 1,447             | 1,476             |
| Lincoln, MT (30053)  | 1,111             | 977               | 1,022             |
| Sanders, MT (30089)  | 783               | 698               | 666               |
| Mineral, MT (30061)  | 351               | 309               | 325               |
| Total                | 16,349            | 16,424            | 17,147            |

### County-by-County Out-Migration

This County-by-County Migration table shows the total number of out-migrants to each county.

| County               | 2004 Out-Migration | 2005 Out-Migration | 2006 Out-migration |
|----------------------|--------------------|--------------------|--------------------|
| Missoula, MT (30063) | 5,724              | 5,554              | 5,524              |
| Flathead, MT (30029) | 3,280              | 3,279              | 3,417              |
| Ravalli, MT (30081)  | 1,925              | 2,127              | 2,005              |
| Lake, MT (30047)     | 1,101              | 1,269              | 1,285              |
| Lincoln, MT (30053)  | 962                | 830                | 982                |
| Sanders, MT (30089)  | 472                | 562                | 532                |
| Mineral, MT (30061)  | 330                | 180                | 293                |
| Total                | 13,794             | 13,801             | 14,038             |

### County-by-County Net Migration

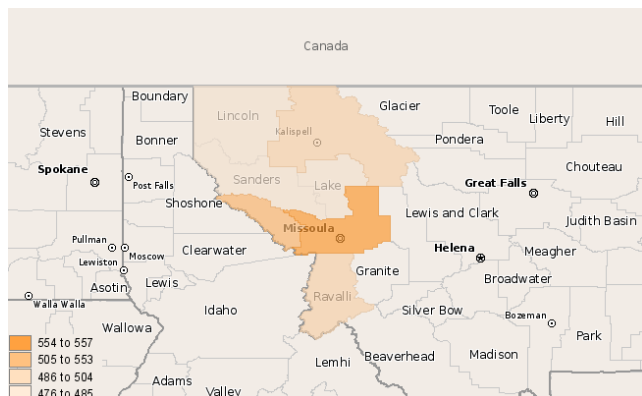
Net migration accounts for both in and out migration and shows the total net inflow or outflow of people.

| County               | 2004 Net Migration | 2004 Percent of Population | 2005 Net Migration | 2005 Percent of Population | 2006 Net Migration | 2006 Percent of Population | 2004-2006 Net Migration | Cumulative Percent Increase |
|----------------------|--------------------|----------------------------|--------------------|----------------------------|--------------------|----------------------------|-------------------------|-----------------------------|
| Flathead, MT (30029) | 1,226              | 1.5%                       | 1,437              | 1.7%                       | 1,587              | 1.9%                       | 4,250                   | 5.2%                        |
| Ravalli, MT (30081)  | 457                | 1.2%                       | 296                | 0.7%                       | 519                | 1.3%                       | 1,272                   | 3.2%                        |
| Missoula, MT (30063) | 65                 | 0.1%                       | 300                | 0.3%                       | 606                | 0.6%                       | 971                     | 1.0%                        |
| Lake, MT (30047)     | 326                | 1.2%                       | 178                | 0.6%                       | 191                | 0.7%                       | 695                     | 2.5%                        |
| Sanders, MT (30089)  | 311                | 2.9%                       | 136                | 1.2%                       | 134                | 1.2%                       | 581                     | 5.3%                        |
| Lincoln, MT (30053)  | 149                | 0.8%                       | 147                | 0.7%                       | 40                 | 0.2%                       | 336                     | 1.8%                        |
| Mineral, MT (30061)  | 21                 | 0.5%                       | 129                | 3.2%                       | 32                 | 0.8%                       | 182                     | 4.7%                        |
| Total                | 2,555              | 1.3%                       | 2,623              | 0.9%                       | 3,109              | 1.1%                       | 5,664                   | 2.8%                        |

## 2007 Median Rent<sup>5</sup>

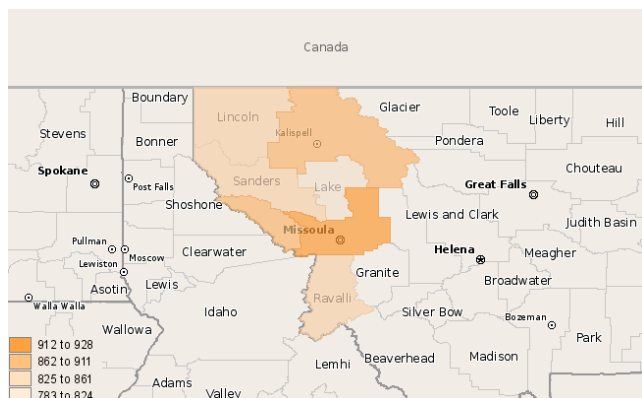
Median residential rent is a key indicator of housing affordability. The following maps and tables display median rental costs for 1 bedroom units and three bedroom units. The last table includes a comparison of the regional value to the state and nation.

### 1 Bedroom Units



| County               | Median Monthly Rent, 1 Bedroom |
|----------------------|--------------------------------|
| Missoula, MT (30063) | \$557.00                       |
| Mineral, MT (30061)  | \$550.00                       |
| Ravalli, MT (30081)  | \$503.00                       |
| Flathead, MT (30029) | \$498.00                       |
| Lincoln, MT (30053)  | \$477.00                       |
| Sanders, MT (30089)  | \$477.00                       |
| Lake, MT (30047)     | \$476.00                       |

### 3 Bedroom Units



| County               | Median Monthly Rent, 3 Bedrooms |
|----------------------|---------------------------------|
| Missoula, MT (30063) | \$928.00                        |
| Flathead, MT (30029) | \$904.00                        |
| Mineral, MT (30061)  | \$903.00                        |
| Lincoln, MT (30053)  | \$842.00                        |
| Sanders, MT (30089)  | \$842.00                        |
| Ravalli, MT (30081)  | \$831.00                        |
| Lake, MT (30047)     | \$783.00                        |

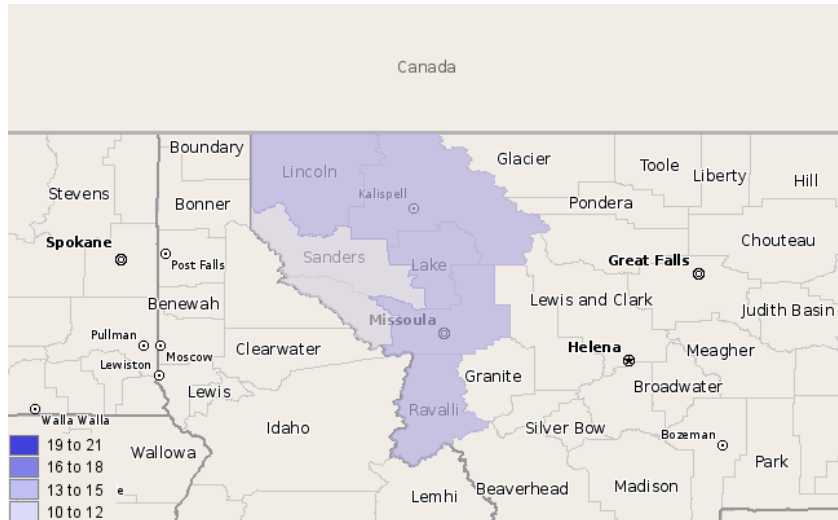
### Regional Averages

| Area            | Average Monthly Rent, 1 Bedroom | Average Monthly Rent, 3 Bedrooms |
|-----------------|---------------------------------|----------------------------------|
| Western Montana | \$505.00                        | \$862.00                         |
| Montana         | \$465.00                        | \$765.00                         |
| Nation          | \$517.00                        | \$823.00                         |

<sup>5</sup> US Department of Housing and Urban Development, Office of Policy Development and Research, 50<sup>th</sup> Percentile Rent Estimates, <http://www.huduser.org/datasets/50per.html>

## 2007 Median Hourly Earnings

Median Hourly Earnings serves as an indicator of the overall quality of jobs within each county. The comparison of region to state and nation provides a benchmark to measure against.



| County               | 2007 Median Hourly Earnings |
|----------------------|-----------------------------|
| Flathead, MT (30029) | \$15.08                     |
| Missoula, MT (30063) | \$14.72                     |
| Lake, MT (30047)     | \$13.58                     |
| Ravalli, MT (30081)  | \$13.47                     |
| Lincoln, MT (30053)  | \$12.99                     |
| Sanders, MT (30089)  | \$12.41                     |
| Mineral, MT (30061)  | \$11.68                     |

### Comparison to State and Nation

| Area            | Median Hourly Earnings |
|-----------------|------------------------|
| Western Montana | \$14.47                |
| State           | \$14.56                |
| Nation          | \$18.72                |

## Patents<sup>6</sup>

Innovation capital measures the ability for a region to create opportunities for technological growth and change. Historically, patent data has been used as a proxy measurement of innovative activities. Though some criticism against the validity of patent data has occurred, past literature has validated using patents as an indicator of technological change by linking them with the actual number of innovations.<sup>7</sup>

The patent data indicates that Flathead County is overwhelmingly the most innovative county. Flathead is the only county in Western Montana that generates a significant amount of new inventions. This unusually high number of patents is largely due to the ongoing work of Semitool Inc. of Kalispell, and another undisclosed proprietor.

| Area                 | Patents per 1000 People |      |                   |
|----------------------|-------------------------|------|-------------------|
|                      | 2005                    | 2006 | 2007 <sup>8</sup> |
| Missoula, MT (30063) | 3.40                    | 2.66 | 1.57              |
| Flathead, MT (30029) | 13.72                   | 11.6 | 9.98              |
| Ravalli, MT (30081)  | 2.76                    | 4.68 | 3.14              |
| Lake, MT (30047)     | 2.12                    | 4.19 | 5.87              |
| Lincoln, MT (30053)  | 0.00                    | 0.52 | 2.07              |
| Sanders, MT (30089)  | 0.91                    | 2.69 | 0.00              |
| Mineral, MT (30061)  | 0.00                    | 0.00 | 0.00              |
| <i>Region Total</i>  | 5.82                    | 5.55 | 4.65              |
| <i>State</i>         | 2.84                    | 2.91 | 2.74              |
| <i>Nation</i>        | 6.83                    | 8.55 | 7.88              |

| Area                 | Patents Granted |         |         |
|----------------------|-----------------|---------|---------|
|                      | 2005            | 2006    | 2007    |
| Missoula, MT (30063) | 34              | 27      | 16      |
| Flathead, MT (30029) | 114             | 99      | 87      |
| Ravalli, MT (30081)  | 11              | 19      | 13      |
| Lake, MT (30047)     | 6               | 12      | 17      |
| Lincoln, MT (30053)  | 0               | 1       | 4       |
| Sanders, MT (30089)  | 1               | 3       | 0       |
| Mineral, MT (30061)  | 0               | 0       | 0       |
| <i>Region Total</i>  | 166             | 161     | 137     |
| <i>State</i>         | 265             | 275     | 261     |
| <i>Nation</i>        | 202,534         | 255,915 | 238,117 |

<sup>6</sup> US Patent and Trademark Office, USPTO Patent Full-Text and Image Database, <http://www.uspto.gov/main/search.html>

<sup>7</sup> Acs, Z.J., Anselin, & Varga, A. (2002). Patents and innovation counts as measures of regional production of new knowledge. *Research Policy*, 31. 1069-1085.

Jaffe, A. (1986). Technological opportunity and spillover of R&D: Evidence from firms' patents, profits, and market value. *American Economic Review*, 76, 984-1001.

Acs, Z.J., & Audretsch, D.B. (1991). *Innovation and Technological Change*. Ann Arbor: University of Michigan Press.

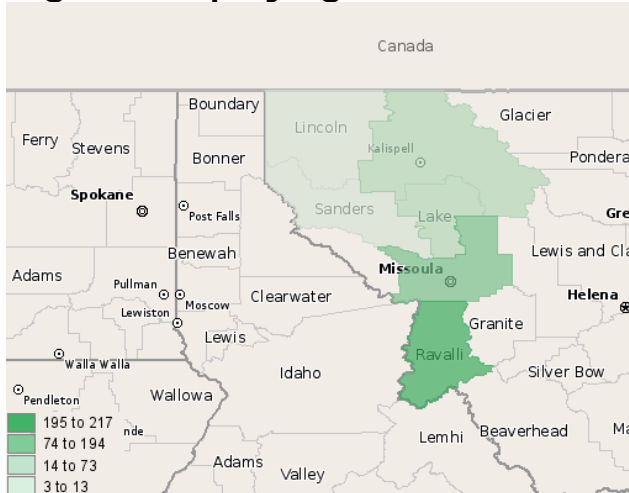
<sup>8</sup> As of August, 2007.



## Research Capabilities

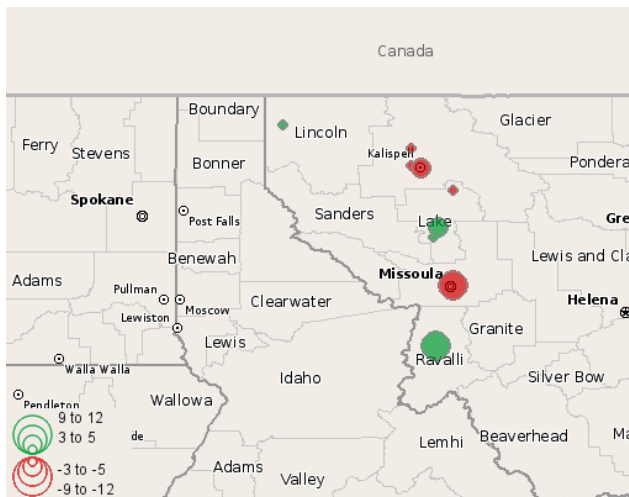
Along with Patents, another critical measure of a region's innovative capacity is the level of scientific research. These tables measure the presence and growth potential in private companies who do physical, engineering and biological research, and social science research.

### Highest Employing Counties



| County               | 2007 Jobs | 2007 EPW | 2007 LQ |
|----------------------|-----------|----------|---------|
| Ravalli, MT (30081)  | 217       | \$94,865 | 2.91    |
| Missoula, MT (30063) | 174       | \$44,365 | 0.62    |
| Flathead, MT (30029) | 27        | \$36,336 | 0.12    |
| Lake, MT (30047)     | 21        | \$33,253 | 0.38    |
| Lincoln, MT (30053)  | < 10      | --       | --      |
| Sanders, MT (30089)  | < 10      | --       | --      |
| Western Montana      | 446       | \$67,674 | 0.64    |
| Montana              | 1,104     | \$59,374 | 0.47    |
| United States        | 650,014   | \$98,948 | --      |

### Growth<sup>9</sup>



| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Ravalli, MT (30081)  | 8             | 4%       |
| Lake, MT (30047)     | 3             | 17%      |
| Sanders, MT (30089)  | --            | --       |
| Lincoln, MT (30053)  | --            | --       |
| Flathead, MT (30029) | -10           | -36%     |
| Missoula, MT (30063) | -11           | -6%      |
| Western Montana      | -7            | -1.6%    |
| Montana              | 15            | 1.3%     |
| United States        | 64,399        | 10%      |

<sup>9</sup> Growth in research will certainly be affected by the expansion of GlaxoSmithKline, Inc. in Hamilton, which intends to add between 100-600 in the near future. Source: The Missoulian Online, *Hamilton / Bitterroot biotech / GlaxoSmithKline spurs industry with \$137 million expansion*, April, 2008. <http://www.missoulian.com/articles/2007/10/19/news/top/news01.txt>

## ***University Research***<sup>10</sup>

It is not possible to isolate university research contributions, so instead of displaying jobs and earnings, this data shows the research strength of the University of Montana.

### **University of Montana Research Funding and Rankings**

| Year | Total Research (millions) | National Rank | Rank among Public and Private Universities <sup>11</sup> |
|------|---------------------------|---------------|--|
| 2005 | \$54,685                  | 163           | 117  |
| 2004 | \$51,078                  | 165           | 119  |
| 2003 | \$43,562                  | 168           | 122  |
| 2002 | \$39,367                  | 168           | 122  |

### **University of Montana Funding by Research Type (2005)**

| Percent Life Sciences | Percent Physical Science | Percent Environmental Science | Percent Engineering Science | Percent Computer Science | Percent Math |
|-----------------------|--------------------------|-------------------------------|-----------------------------|--------------------------|--------------|
| 67% <sup>12</sup>     | 7%                       | 3%                            | 0%                          | 0.3%                     | 2%           |

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<sup>10</sup> Center for Measuring University Performance, "2007 The Top American Research Universities," <http://mup.asu.edu/research2007.pdf>

<sup>11</sup> This number is more accurate for comparisons, because it compares only to national public universities, while excluding private schools.

<sup>12</sup> This includes research into forestry, biology, genetics, etc.

## ***Financial Capital Indicators***

Access to banking and financial institutions is a crucial asset for supporting entrepreneurship and innovation. Availability of financial capital allows entrepreneurs and proprietors to finance the development or expansion of a firm.

Venture capital data for Montana is shown below with historical and current investments in Montana-based companies. In addition, Montana-based venture funds are located on the corresponding table.

Key regional finance industries are also analyzed as an indirect indication of available financial capital. Financing and lending is fairly mobile in the sense that a person or business can obtain funds for investment almost anywhere. However, local businesses tend to deal more with finance and lending institutions found in the local economy.

## ***Montana Venture Capital<sup>13</sup>***

### **Historical Venture Capital Investments in Montana Companies**

| Year | Companies | Deals | Investment (\$M) |
|------|-----------|-------|------------------|
| 2000 | 3         | 3     | 16.7             |
| 2001 | 2         | 2     | 24.8             |
| 2002 | 1         | 2     | 27.4             |
| 2003 | 1         | 1     | 4.0              |
| 2004 | 1         | 1     | 15.0             |
| 2005 | 3         | 3     | 16.7             |
| 2006 | 2         | 2     | 24.8             |

### **2008 Venture Capital Investments by Location of Financier**

| State Source  | Investors | Deals |
|---------------|-----------|-------|
| California    | 1         | 1     |
| Massachusetts | 1         | 1     |
| Maryland      | 1         | 1     |
| Non-US        | 2         | 1     |
| Ohio          | 1         | 1     |
| Pennsylvania  | 1         | 1     |
| New York      | 1         | 1     |
| Total         | 10        | 8     |

### **Montana Based Venture Funds**

| Firm                                       | Location     |
|--|--------------|
| Montana Community Development Organization | Missoula, MT |
| Glacier Venture Fund                       | Missoula, MT |
| Frontier Angel Fund                        | Polson, MT   |

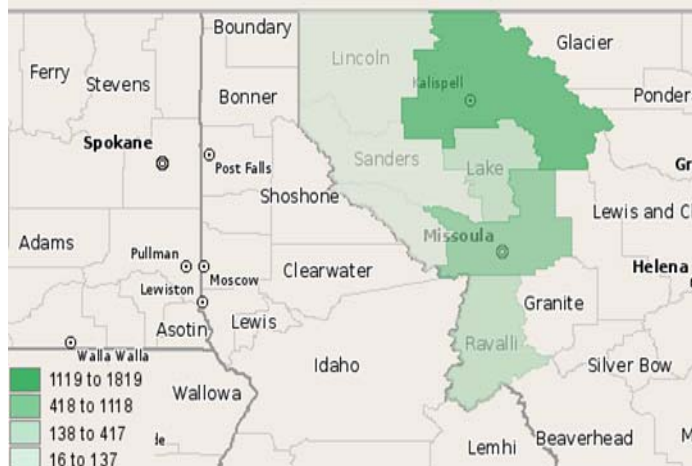
<sup>13</sup> 2008 PricewaterhouseCooper/Venture Economics/NVCA MoneyTree Survey. Data current as of 15-APR-2008.  
<https://www.pwcmoneytree.com/MTPublic/ns/index.jsp>

## Financial Industry Base

The following maps and tables highlight counties with the highest relative concentration (based on location quotient) of finance industries as well as employment growth.

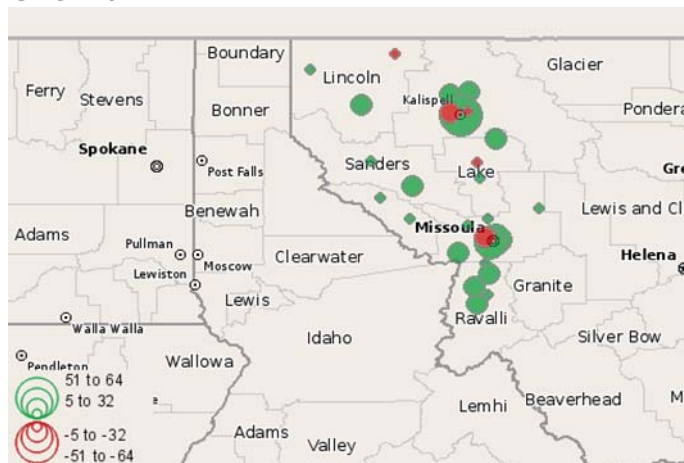
Measuring LQ for finance industries is an indirect way to indicate a counties capacity to provide financial capital.

### Highest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Flathead, MT (30029) | 1,674     | 0.91    |
| Missoula, MT (30063) | 1,589     | 0.70    |
| Ravalli, MT (30081)  | 438       | 0.72    |
| Lake, MT (30047)     | 349       | 0.79    |
| Lincoln, MT (30053)  | 147       | 0.51    |
| Sanders, MT (30089)  | 92        | 0.53    |
| Mineral, MT (30061)  | 18        | 0.27    |
| Western Montana      | 4,306     | 0.76    |
| State                | 14,183    | 0.75    |
| Nation               | 5,262k    | --      |

### Growth



| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Flathead, MT (30029) | 242           | 15%      |
| Missoula, MT (30063) | 205           | 13%      |
| Ravalli, MT (30081)  | 78            | 18%      |
| Sanders, MT (30089)  | 24            | 26%      |
| Lake, MT (30047)     | 23            | 7%       |
| Lincoln, MT (30053)  | 21            | 14%      |
| Mineral, MT (30061)  | 7             | 39%      |
| Western Montana      | 601           | 14%      |
| State                | 2,011         | 14%      |
| Nation               | 720,193       | 14%      |

### Highest Growth Industries

| NAICS Code | Name  | 2007 Jobs | 5 Year Growth | % Growth | 2007 EPW |
|------------|---|-----------|---------------|----------|----------|
| 522110     | Commercial banking                            | 1,646     | 162           | 10%      | \$38,568 |
| 522130     | Credit unions                                 | 303       | 11            | 4%       | \$27,650 |
| 522292     | Real estate credit                            | 283       | 35            | 12%      | \$61,551 |
| 523120     | Securities brokerage                          | 196       | 39            | 20%      | \$79,916 |
| 522310     | Mortgage and nonmortgage loan brokers         | 98        | 27            | 28%      | \$43,502 |
| 522291     | Consumer lending                              | 90        | 18            | 20%      | \$34,328 |
| 522220     | Sales financing                               | 35        | 30            | 89%      | \$32,426 |
| 523930     | Investment advice                             | 34        | 10            | 28%      | \$39,764 |
| 522390     | Other credit intermediation activities        | 21        | 5             | 21%      | \$26,023 |
| 522320     | Financial transaction processing and clearing | 19        | 3             | 13%      | \$83,039 |

## Commuting Data

Quality of life data is hard to come by but commuting statistics can give some approximate estimates on how desirable and feasible it is to live in a region. There are three types of commuting data included in this analysis. 1) Average commute time by county, 2) the number of residents who work both inside and outside of the region, 3) the number of people who commute into the area to work.

Commute times for Western Montana compare well to the national and regional averages. These statistics are hard to compare from county to county because the region contains both urban and rural communities. Typically, urban areas have longer average commute times than rural areas but the Missoula and Kalispell transportation systems have remained relatively un-congested, and many residents in the other five rural counties commute a longer than average distance to get to work. Therefore, with the exception of Lake County, the more rural counties have slightly higher than average commute times and Flathead and Missoula Counties have slightly lower than average commute times.

### Average Commute Times<sup>14</sup>

| County        | Average Commute Times, (minutes) |
|---------------|----------------------------------|
| Missoula      | 19.1                             |
| Flathead      | 18.9                             |
| Ravalli       | 23.0                             |
| Lake          | 18.4                             |
| Lincoln       | 17.6                             |
| Sanders       | 22.3                             |
| Mineral       | 22.6                             |
| Montana       | 17.7                             |
| Idaho         | 20.0                             |
| Washington    | 25.5                             |
| United States | 25.5                             |

### Commuting Patterns<sup>15</sup>

Generally speaking an area with a high proportion of commuters offers more attractive jobs than its surrounding region. On the other hand, if in-commuting statistics are unusually high it is possible that people are choosing not to live in the area because it does not offer the quality of life and amenities that they value. This could also potentially put a tax strain on the people who live in the community receiving the in-commuters. Conversely, if an area has unusually high number of out-commuters it is either an indication of a lack of jobs, or that the area is serving as a bed-room community for a larger nearby municipality.

A cautionary note should be added to this commuter data. The most recent commuting data available is from 2004. The population growth in the area, especially in Flathead County, may have altered these patterns since that time.

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<sup>14</sup> US Census Bureau American Community Survey 2006, [http://factfinder.census.gov/home/saff/main.html?\\_lang=en](http://factfinder.census.gov/home/saff/main.html?_lang=en)

<sup>15</sup> US Census Bureau, Longitudinal Employer-Household Dynamics 2004, <http://lehd.did.census.gov/led/>.

## Western Montana Commuter Patterns

The data for the Western Montana region indicates that the region is maintaining a healthy base of jobs. 89% of regional residents work in the region, and 85% of workers in the area also reside in the region. These statistics are closely balanced enough to say that the region is neither overwhelmed with in-commuters, nor losing too many workers outside of the region. Within the region, the residents of Ravalli County are the most likely to work outside of the region. Over 3,000 people from Ravalli commute to work outside of the Western Montana region.

### Western Montana Commuter Shed Report

This panel shows the number of residents who work within the region and which counties that they live in.

| County                       | Workers | Percent of Workforce |
|------------------------------|---------|----------------------|
| Missoula                     | 44,529  | 39.8%                |
| Flathead                     | 31,002  | 27.7%                |
| Ravalli                      | 9,315   | 8.3%                 |
| Lake                         | 8,111   | 7.3%                 |
| Lincoln                      | 4,133   | 3.7%                 |
| Sanders                      | 2,214   | 2.0%                 |
| Mineral                      | 871     | 0.1%                 |
| Residents who work in Region | 100,175 | 88.9%                |

### Western Montana Regional Labor Shed Report

This panel shows the number of regional workers who live within the region and which counties they come from.

| County                     | Workers | Percent of Workforce |
|----------------------------|---------|----------------------|
| Missoula                   | 41,484  | 35.6%                |
| Flathead                   | 30,534  | 26.2%                |
| Ravalli                    | 12,041  | 10.3%                |
| Lake                       | 8,947   | 7.7%                 |
| Lincoln                    | 4,333   | 3.7%                 |
| Sanders                    | 1,995   | 1.7%                 |
| Mineral                    | 904     | 0.1%                 |
| Workers who live in Region | 100,238 | 85.3%                |

### Regional Out-Commuters

This panel shows the number of residents who work outside of the region and which counties that they live in.

| County                            | Workers | Percent of Workforce |
|-----------------------------------|---------|----------------------|
| Yellowstone                       | 2,757   | 2.5%                 |
| Lewis and Clark                   | 1,843   | 1.6%                 |
| Cascade                           | 1,538   | 1.4%                 |
| Gallatin                          | 1,473   | 1.3%                 |
| All other regions                 | 4,030   | 3.6%                 |
| Residents who work outside Region | 11,641  | 10.4%                |

### Regional In-Commuters

This panel shows the workers who commute into the region and which counties they come from.

| County                          | Workers | Percent of Workforce |
|---------------------------------|---------|----------------------|
| Yellowstone                     | 3,108   | 2.7%                 |
| Cascade                         | 1,948   | 1.7%                 |
| Lewis and Clark                 | 1,925   | 1.7%                 |
| Gallatin                        | 1,490   | 1.3%                 |
| All other regions               | 3,107   | 2.7%                 |
| Workers who live outside Region | 11,578  | 10.4%                |

## ***City of Missoula Commuter Patterns***

The data for the City of Missoula shows that the majority of Missoula residents, 66.4%, work within the city. The remaining 34% work in other cities/towns. Also, among all cities the highest percentages of workers, 48.4%, reside in Missoula. A decent percentage, 4.8%, comes from the neighboring community of Orchard Homes. The data indicates that Missoula is a regional economic hub that imports more people from surrounding communities to work than it exports.

### **City of Missoula Commuter Shed Report**

This panel shows the top 10 cities/towns where Missoula residents work.

| City                | Out-Commuting Workers | Percent of Workforce |
|---------------------|-----------------------|----------------------|
| Missoula            | 22,512                | 66.4%                |
| Billings            | 960                   | 2.8%                 |
| Helena              | 580                   | 1.7%                 |
| Great Falls         | 494                   | 1.5%                 |
| Kalispell           | 472                   | 1.4%                 |
| Butte-Silver Bow    | 451                   | 1.3%                 |
| Orchard Homes       | 394                   | 1.2%                 |
| Bozeman             | 343                   | 1.0%                 |
| Wye                 | 251                   | 0.7%                 |
| Lolo                | 239                   | 0.7%                 |
| All Other Locations | 7,201                 | 21.2%                |

### **City of Missoula Labor Shed Report**

This panel shows the top 10 cities/towns where people who commute to the city of Missoula live.

| City                | In-Commuting Workers | Percent of Workforce |
|---------------------|----------------------|----------------------|
| Missoula            | 21,323               | 48.4%                |
| Orchard Homes       | 2,098                | 4.8%                 |
| Billings            | 1,002                | 2.3%                 |
| Lolo                | 940                  | 2.1%                 |
| Great Falls         | 805                  | 1.8%                 |
| East Missoula       | 701                  | 1.6%                 |
| Butte-Silver Bow    | 695                  | 1.6%                 |
| Helena              | 520                  | 1.2%                 |
| Bonner-West         | 440                  | 1.0%                 |
| Riverside           | 440                  | 1.0%                 |
| Bozeman             | 346                  | 0.8%                 |
| All Other Locations | 15,156               | 34.4%                |

## ***City of Kalispell Commuter Patterns***

The data shows that 46.5% of Kalispell residents work in the city of Kalispell. The remaining 54% work in other cities/towns. Also, 25.9% of Kalispell workers reside in Kalispell. A high percentage, 9.1% comes from the neighboring community of Evergreen. Kalispell has an interesting exchange of commuters. More than half of the residents of the city work elsewhere, and almost three-quarters of the Kalispell workforce is composed of people who live outside the city.

### **City of Kalispell Commuter Shed Report**

This panel shows the top 10 cities/towns where Kalispell residents work.

| City                | Out-Commuting Workers | Percent of Workforce |
|---------------------|-----------------------|----------------------|
| Kalispell           | 6,511                 | 46.5%                |
| Evergreen           | 1,324                 | 9.5%                 |
| Missoula            | 552                   | 3.9%                 |
| Whitefish           | 434                   | 3.1%                 |
| Columbia Falls      | 347                   | 2.5%                 |
| Billings            | 281                   | 2.0%                 |
| Helena              | 216                   | 1.5%                 |
| Great Falls         | 198                   | 1.4%                 |
| Bigfork             | 126                   | 0.9%                 |
| Bozeman             | 92                    | 0.7%                 |
| All Other Locations | 3,929                 | 28.0%                |

### **City of Kalispell Labor Shed Report**

This panel shows the top 10 cities/towns where people who commute to the city of Kalispell live.

| City                | In-Commuting Workers | Percent of Workforce |
|---------------------|----------------------|----------------------|
| Kalispell           | 5,263                | 25.9%                |
| Evergreen           | 1,852                | 9.1%                 |
| Missoula            | 507                  | 2.5%                 |
| Whitefish           | 452                  | 2.2%                 |
| Billings            | 439                  | 2.2%                 |
| Columbia Falls      | 387                  | 1.9%                 |
| Great Falls         | 243                  | 1.2%                 |
| Helena              | 220                  | 1.1%                 |
| Bozeman             | 203                  | 1.0%                 |
| Butte-Silver Bow    | 157                  | 0.8%                 |
| All Other Locations | 10,595               | 52.1%                |



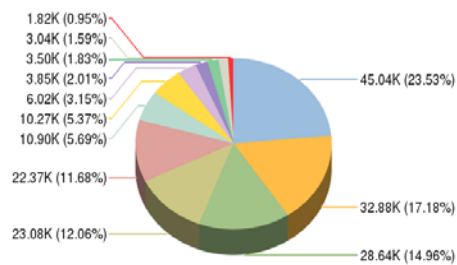
## Economic Base

Economic base analysis uses a model of the region's economy to show which groups of industries are most fundamental; that is, which bring money into a region rather than simply circulating dollars that are already present. The first type of industries is called "basic" while the second type is called "non-basic." Basic industries are important because growth or decline in them results in large ripple effects across the economy. Basic industries generally export products and services to non-regional purchasers. The model calculates how much of each industry's jobs and earnings rely on its exports, then uses multiplier effects to attribute jobs and earnings from other industries to the original "basic" industry.

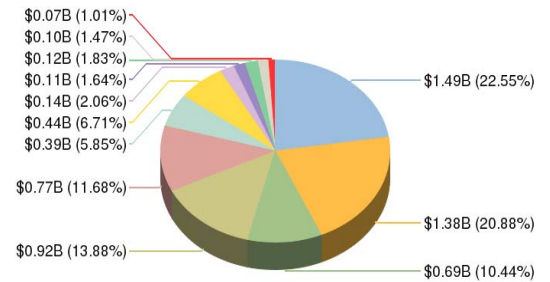
### Regional Economic Base

The Economic base data for the region reveals that Western Montana economy is fairly diverse with services, government, visitors, manufacturing & construction all contributing a good portion of jobs and earnings. Though Services and Government are typically some of the largest contributing sectors to economic base, Manufacturing and Visitors are playing a much larger part than average in Western Montana. Interestingly, although there are a high number of second homes owned by part-time residents in Missoula County resident's outside Income is responsible for less than 2% of the jobs and earnings in the region.

#### Jobs



#### Earnings



#### Total

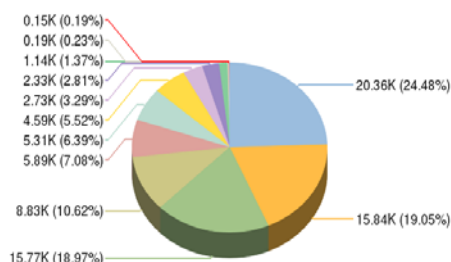
| Sector                    | Jobs   | Earnings(K) | Jobs % | Earnings % | EPW(K) |
|---------------------------|--------|-------------|--------|------------|--------|
| Services                  | 45,044 | \$1,489,765 | 24%    | 23%        | \$33   |
| Government                | 32,882 | \$1,379,247 | 17%    | 21%        | \$42   |
| Visitors                  | 28,635 | \$689,330   | 15%    | 10%        | \$24   |
| Manufacturing             | 23,081 | \$916,992   | 12%    | 14%        | \$40   |
| Construction              | 22,366 | \$771,343   | 12%    | 12%        | \$34   |
| Finance                   | 10,900 | \$386,601   | 6%     | 6%         | \$35   |
| All Other                 | 10,273 | \$443,510   | 5%     | 7%         | \$43   |
| Agriculture               | 6,020  | \$136,070   | 3%     | 2%         | \$23   |
| Residents' Outside Income | 3,850  | \$108,108   | 2%     | 2%         | \$28   |
| Exogenous Investment      | 3,505  | \$120,667   | 2%     | 2%         | \$34   |
| Communications            | 3,042  | \$97,113    | 2%     | 1%         | \$32   |
| Mining                    | 1,818  | \$66,884    | 1%     | 1%         | \$37   |

## Urban Economic Base

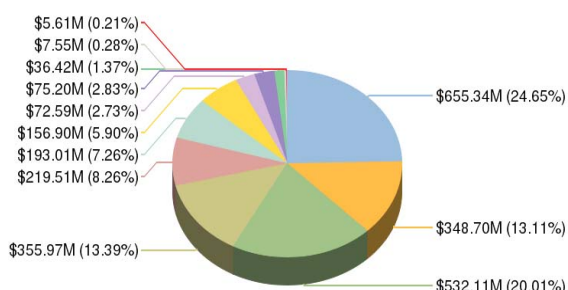
Includes Kalispell and Missoula

The Economic Base of these two cities is less balanced than that of the region as a whole. Manufacturing and Construction are far less prominent, whereas visitor industries are much more important. It is also important to note that there is a large discrepancy between the number of jobs and the amount of earnings attributable to Visitor industries, indicating that the jobs in these industries are lower paying than the regional average.

### Jobs



### Earnings



### Total

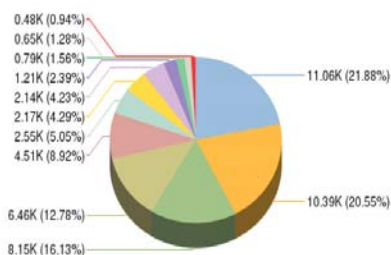
| Sector                    | Jobs   | Earnings(K) | Jobs % | Earnings % | EPW(K) |
|---------------------------|--------|-------------|--------|------------|--------|
| Services                  | 20,359 | \$655,342   | 24%    | 25%        | \$32   |
| Visitors                  | 15,844 | \$348,699   | 19%    | 13%        | \$22   |
| Government                | 15,774 | \$532,114   | 19%    | 20%        | \$34   |
| Manufacturing             | 8,832  | \$355,973   | 11%    | 13%        | \$40   |
| All Other                 | 5,885  | \$219,514   | 7%     | 8%         | \$37   |
| Finance                   | 5,315  | \$193,015   | 6%     | 7%         | \$36   |
| Construction              | 4,588  | \$156,900   | 6%     | 6%         | \$34   |
| Residents' Outside Income | 2,732  | \$72,595    | 3%     | 3%         | \$27   |
| Communications            | 2,334  | \$75,204    | 3%     | 3%         | \$32   |
| Exogenous Investment      | 1,143  | \$36,419    | 1%     | 1%         | \$32   |
| Agriculture               | 194    | \$7,553     | 0%     | 0%         | \$39   |
| Mining                    | 155    | \$5,610     | 0%     | 0%         | \$36   |

## Non-Urban Economic Base

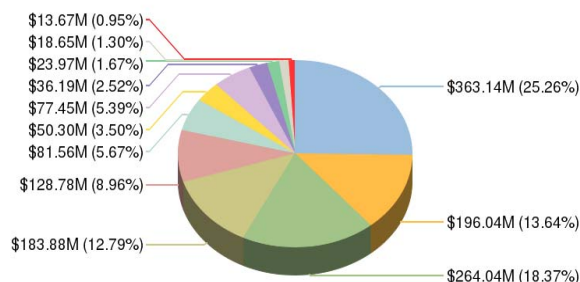
All areas except for Missoula and Kalispell

The data for this area shows that the rural areas in Western Montana are most reliant on Government, Visitors and Manufacturing. Unlike the urban areas Construction and Manufacturing are vital to these communities, together attributing 25% of the jobs and 27% of the earnings.

### Jobs



### Earnings



### Total

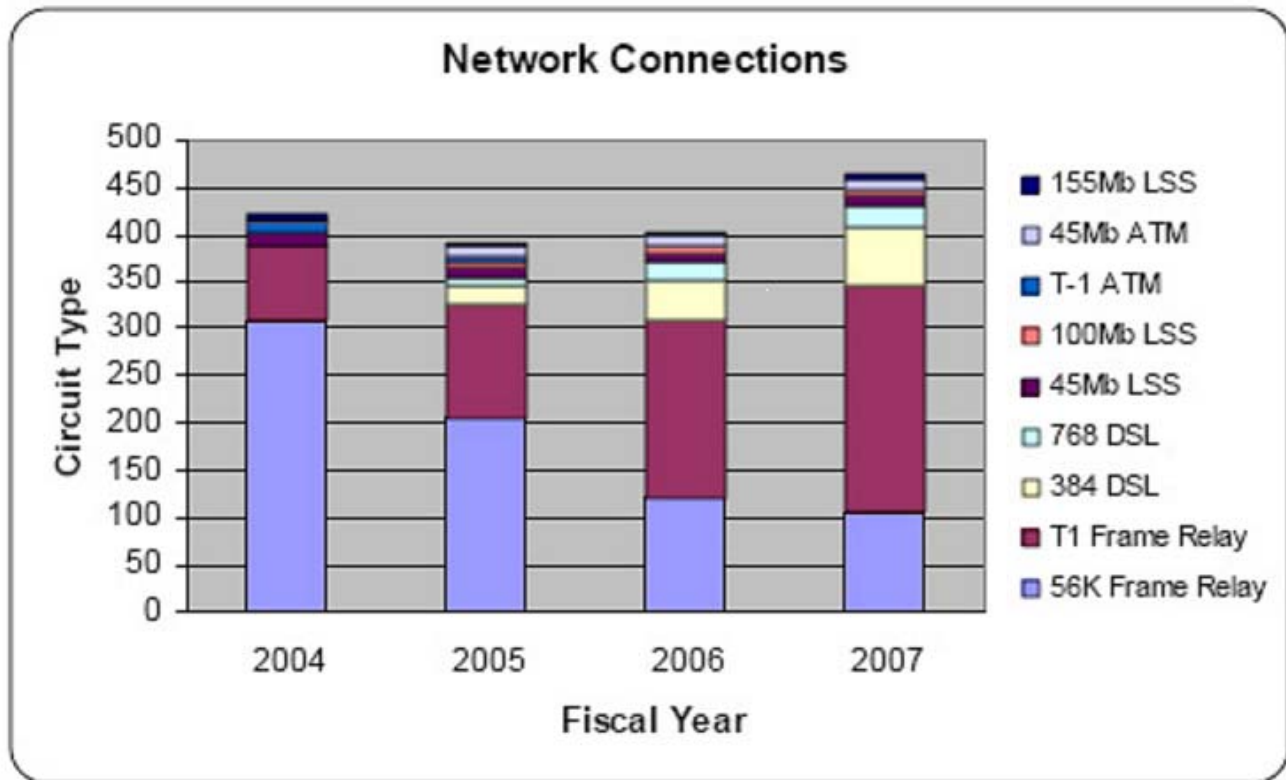
| Sector                    | Jobs   | Earnings(K) | Jobs % | Earnings % | EPW(K) |
|---------------------------|--------|-------------|--------|------------|--------|
| Government                | 11,063 | \$363,139   | 22%    | 25%        | \$33   |
| Visitors                  | 10,387 | \$196,042   | 21%    | 14%        | \$19   |
| Manufacturing             | 8,152  | \$264,042   | 16%    | 18%        | \$32   |
| Services                  | 6,461  | \$183,881   | 13%    | 13%        | \$28   |
| Construction              | 4,510  | \$128,776   | 9%     | 9%         | \$29   |
| Finance                   | 2,555  | \$81,563    | 5%     | 6%         | \$32   |
| Residents' Outside Income | 2,167  | \$50,296    | 4%     | 3%         | \$23   |
| All Other                 | 2,138  | \$77,451    | 4%     | 5%         | \$36   |
| Mining                    | 1,210  | \$36,186    | 2%     | 3%         | \$30   |
| Agriculture               | 790    | \$23,965    | 2%     | 2%         | \$30   |
| Exogenous Investment      | 646    | \$18,653    | 1%     | 1%         | \$29   |
| Communications            | 476    | \$13,665    | 1%     | 1%         | \$29   |

## Communications Infrastructure Indicators

A region's infrastructure is a crucial element for economic development. Companies that rely on modern technology need a highly developed communications infrastructure.

### Internet Availability<sup>16</sup>

According to the state Information Technology Services Division, the majority of the state is operating with T1 Frame Relay or less. This is significantly behind the national average of the nation and the surrounding states.

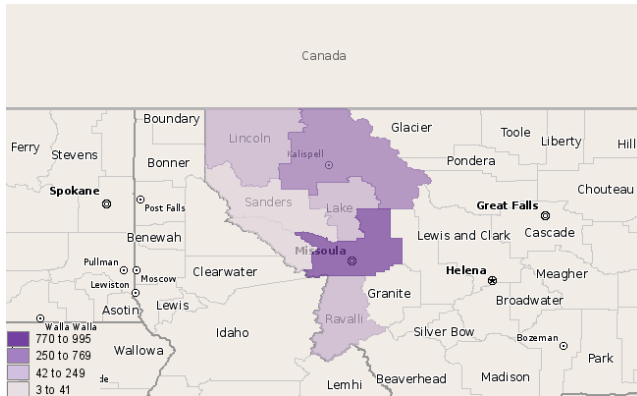


<sup>16</sup> Montana Information Technology Services Division, "Biennial Report January 2007," 14.  
[http://itsd.mt.gov/content/stratplan/statewide/2007\\_biennial\\_report.pdf](http://itsd.mt.gov/content/stratplan/statewide/2007_biennial_report.pdf)

## Communications Industry Base

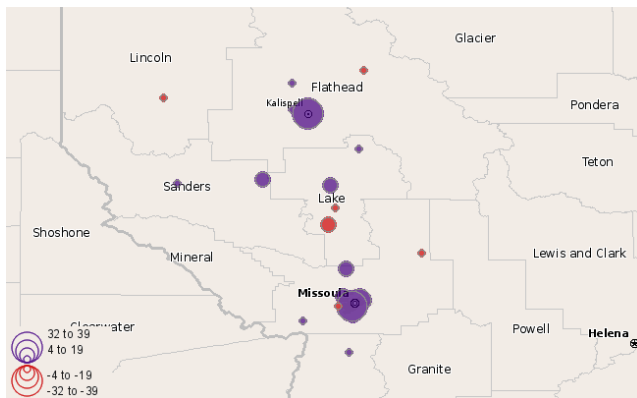
The following maps and tables highlight counties with the highest relative concentration (based on location quotient) of communications industries as well as employment growth. Measuring LQ for communications industries is an indirect way to indicate a counties capacity to provide communications infrastructure.

### Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 995       | 1.14    |
| Flathead, MT (30029) | 546       | 0.85    |
| Lake, MT (30047)     | 67        | 0.49    |
| Lincoln, MT (30053)  | 61        | 0.68    |
| Ravalli, MT (30081)  | 44        | 0.25    |
| Sanders, MT (30089)  | 34        | 0.66    |
| Mineral, MT (30061)  | <10       | --      |

### Growth



| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 88            | 9%       |
| Flathead, MT (30029) | 43            | 8%       |
| Sanders, MT (30089)  | 8             | 22%      |
| Ravalli, MT (30081)  | 1             | 3%       |
| Mineral, MT (30061)  | --            | --       |
| Lincoln, MT (30053)  | -1            | -1%      |
| Lake, MT (30047)     | -1            | -2%      |

### Communications Infrastructure Industries- Region Totals

| NAICS Code | Name                                 | 2007 Jobs | 2012 Jobs | 5 Year Growth | 2007 LQ |
|------------|--------------------------------------|-----------|-----------|---------------|---------|
| 518210     | Data processing and related services | 245       | 309       | 64            | 0.95    |
| 517212     | Cellular and other wireless carriers | 160       | 217       | 57            | 0.90    |
| 517310     | Telecommunications resellers         | 65        | 95        | 30            | 0.55    |
| 515120     | Television broadcasting              | 166       | 194       | 28            | 1.36    |
| 511210     | Software publishers                  | 41        | 47        | 6             | 0.17    |
| 517211     | Paging                               | 12        | 14        | 2             | 0.73    |
| 516110     | Internet publishing and broadcasting | 12        | <10       | --            | --      |
| 518111     | Internet service providers           | 49        | 44        | -5            | 0.53    |
| 511110     | Newspaper publishers                 | 449       | 441       | -8            | 1.31    |
| 517510     | Cable and other program distribution | 155       | 143       | -12           | 1.13    |
| 517110     | Wired telecommunications carriers    | 396       | 379       | -17           | 0.87    |
|            |                                      | 1,750     | 1,889     | 140           |         |

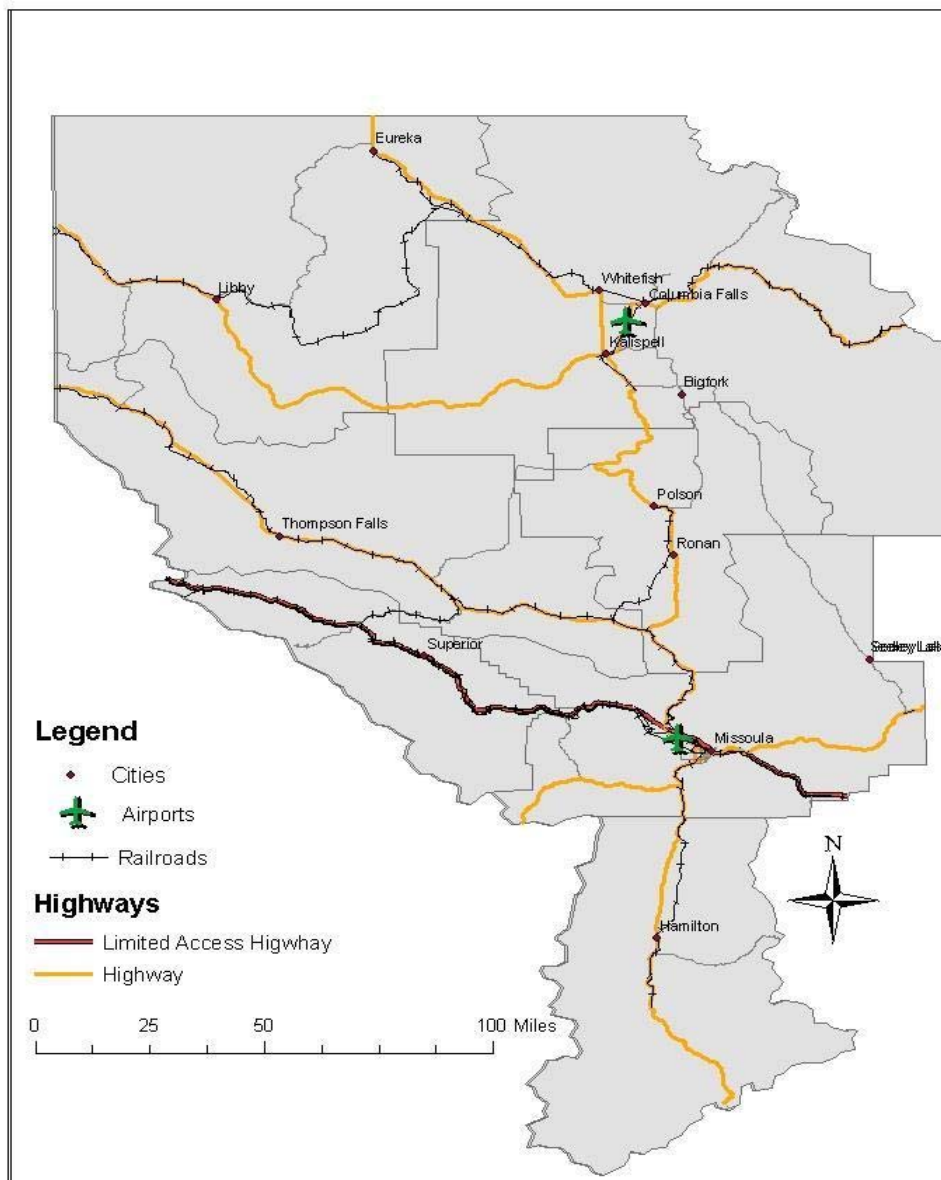
## Transportation Infrastructure Indicators

While communications infrastructure indicates how virtually connected a region is, transportation infrastructure demonstrates a region's ability to process and facilitate the movement of goods. Trucking, logistics, and warehouse storage companies make it possible for the region to participate in inter-regional and international trade.

The figure below locates key transportation infrastructure including major airports, railroads and highways. Municipalities with greater connectivity can be easily discerned.

*Note: Municipal airports not included.*

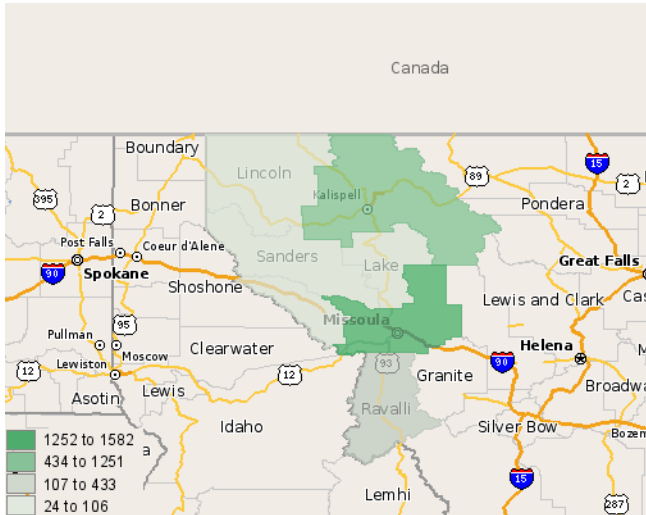
### Transportation Map



## Transportation Industry Base

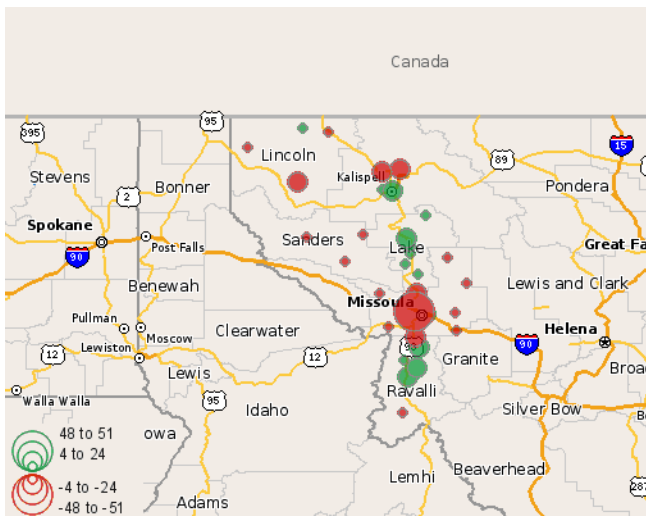
The following maps and tables highlight counties with the highest relative concentration (based on location quotient) of transportation industries as well as employment growth. Measuring LQ for transportation industries is an indirect way to indicate a region's capacity to provide transportation infrastructure.

### Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 1,582     | 1.43    |
| Flathead, MT (30029) | 921       | 1.13    |
| Ravalli, MT (30081)  | 250       | 1.10    |
| Lincoln, MT (30053)  | 104       | 0.91    |
| Lake, MT (30047)     | 90        | 0.52    |
| Sanders, MT (30089)  | 65        | 1.00    |
| Mineral, MT (30061)  | 24        | 0.94    |

### Growth/Decline



| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Ravalli, MT (30081)  | 23            | 9%       |
| Lake, MT (30047)     | 19            | 20%      |
| Mineral, MT (30061)  | 0             | 1%       |
| Flathead, MT (30029) | -1            | -0%      |
| Sanders, MT (30089)  | -2            | -3%      |
| Lincoln, MT (30053)  | -9            | -8%      |
| Missoula, MT (30063) | -53           | -3%      |

## Transportation Infrastructure Industries- Region Totals

| NAICS Code | Name   | 2007 Jobs | 5 Year Growth | 2007 LQ |
|------------|--|-----------|---------------|---------|
| 481111     | Scheduled passenger air transportation       | 132       | 42            | 0.32    |
| 481211     | Nonscheduled air passenger chartering        | 80        | 21            | 2.37    |
| 488510     | Freight transportation arrangement           | 177       | 14            | 1.00    |
| 484210     | Used household and office goods moving       | 96        | 11            | 0.97    |
| 484122     | General freight trucking, long-distance LTL  | 138       | 12            | 0.62    |
| 488490     | Other support activities for road transport. | 22        | 4             | 0.68    |
| 487210     | Scenic and sightseeing transportation, water | 12        | 4             | 0.80    |
| 482110     | Rail transportation                          | 920       | 4             | 3.54    |
| 488210     | Support activities for rail transportation   | 15        | -1            | 0.64    |
| 484230     | Other specialized trucking, long-distance    | 105       | 0             | 0.90    |
| 484220     | Other specialized trucking, local            | 186       | 0             | 0.93    |
| 481219     | Other nonscheduled air transportation        | 14        | -3            | 6.20    |
| 488190     | Other support activities for air transport.  | 93        | -3            | 1.08    |
| 485510     | Charter bus industry                         | 16        | -6            | 0.52    |
| 488119     | Other airport operations                     | 42        | -20           | 0.66    |
| 484110     | General freight trucking, local              | 131       | -49           | 0.58    |
| 484121     | General freight trucking, long-distance TL   | 859       | -55           | 1.63    |
|            |  | 3,037     | -25           |         |



## Industry Characteristics

Understanding current regional industry strengths and future trends is a critical step in the process of developing a growth strategy. Competitive regions learn to build off their existing industrial base, attracting similar industries as well as recruiting new industries that have requirements the region can meet.

## *Key Regional Employers*

The following lists of Western Montana's largest employers have been aggregated from a list provided by the Montana Department of Labor and Industry. Two columns of EMSI data have been added to the tables to provide further insight into the economic contributions of these companies.

The last two columns display Industrial Mean Earnings/ Worker (Industry EPW) and the Regional Income Multiplier, (Income Mult.). The Industry EPW is a measure of how lucrative that industry is in the region. These data are typically higher than simply salary statistics for two reasons. 1) The data is calculated as a mean average of all employees in the company, including owners and administration, 2) All forms of benefits are included in the calculation which includes retirement contributions, insurance and any other type of employer spending on behalf of their employees. The Regional Income Multiplier gives an approximate measure of how much additional regional earnings can be attributed to the existence of that industry. It shows what percentage of a dollar is re-circulated in the county before it is exported, the higher the number the more critical the industry. An average Income Multiplier is around 1.3.

## Top Regional Private Employers<sup>17</sup>

| Employer <sup>18</sup>            | Company Size (employee #) <sup>19</sup> | County   | Industry EPW | Income Mult. |
|-----------------------------------|---|----------|--------------|--------------|
| Kalispell Regional Medical Center | 1,000 and over                          | Flathead | \$38,495     | 1.43         |
| Community Medical Center          | 1,000 and over                          | Missoula | \$46,484     | 1.4          |
| St Patrick Hospital               | 1,000 and over                          | Missoula | \$46,484     | 1.4          |
| Semitool Inc                      | 500_999                                 | Flathead | \$69,932     | 1.58         |
| Workplace Inc.                    | 500_999                                 | Flathead | \$21,556     | 1.32         |
| DirectTV Customer Service         | 500_999                                 | Missoula | \$23,939     | 1.47         |
| Wal-Mart                          | 500_999                                 | Missoula | \$25,439     | 1.36         |
| Marcus Daly Memorial Hospital     | 500_999                                 | Ravalli  | \$36,705     | 1.33         |
| Columbia Falls Aluminum           | 250_499                                 | Flathead | \$71,786     | 1.67         |
| Glacier Bank                      | 250_499                                 | Flathead | \$38,886     | 1.69         |
| L C Staffing Service              | 250_499                                 | Flathead | \$21,556     | 1.32         |
| Plum Creek Timber                 | 250_499                                 | Flathead | \$42,771     | 2.03         |
| Super 1 Foods                     | 250_499                                 | Flathead | \$22,149     | 1.4          |
| Teletech                          | 250_499                                 | Flathead | \$18,839     | 1.5          |
| Wal-Mart                          | 250_499                                 | Flathead | \$28,097     | 1.4          |
| Albertsons                        | 250_499                                 | Missoula | \$19,603     | 1.36         |
| Consumer Direct Personal Care     | 250_499                                 | Missoula | \$21,859     | 1.32         |
| Nightingale Nursing Services      | 250_499                                 | Missoula | \$21,859     | 1.32         |
| Opportunity Resources             | 250_499                                 | Missoula | \$13,460     | 1.35         |
| Smurfit-Stone Container Corp      | 250_499                                 | Missoula | \$109,631    | 2.03         |
| Western Montana Clinic            | 250_499                                 | Missoula | \$71,836     | 1.38         |

<sup>17</sup> Montana Department of Labor and Industry, Top Employers:

<http://www.ourfactsyourfuture.org/?PAGEID=67&SUBID=154#top100>. Industry Earnings and multipliers from EMSI.

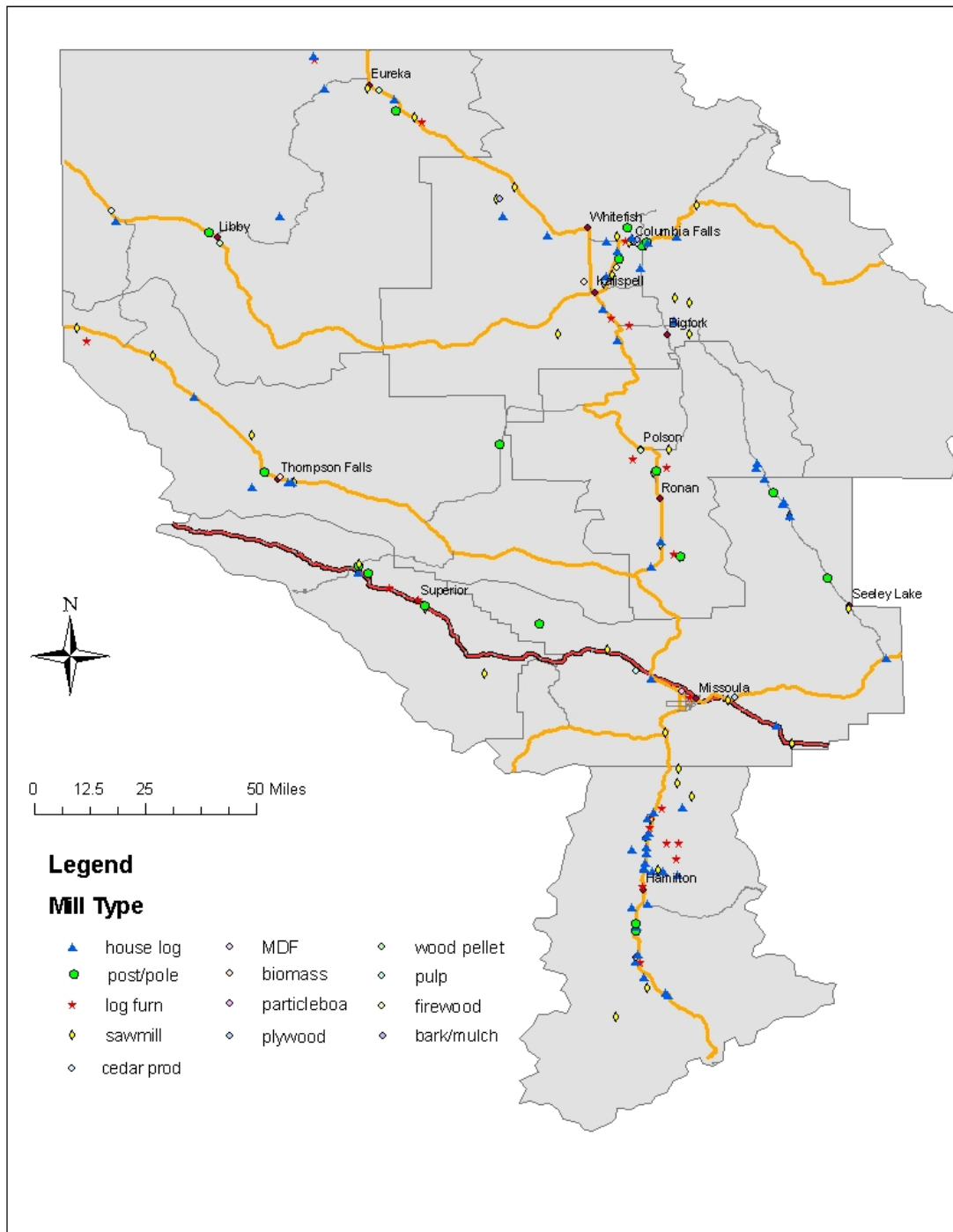
<sup>18</sup> Another critical company that will play an increasingly important role is GlaxoSmithKline, Inc., which has a biotechnology research facility in Hamilton. In April 2008 the company announced that it will be expanding employment to between 260-290 employees in 2008, and possibly more in the future.

<sup>19</sup> The company size is calculated by the presence of the company in each county. Some companies may have more employees in other counties.

## Top Regional Forest Products Companies

This map and table displays the location of the top forest products employers in Montana. There are seventeen major Forest Products locations in state and ten of them are located within the Western Montana region. The map displays the major forest products establishments, by industry type, along with the major arterial roadways.

### Map of Key Forest Products Businesses



## Key Forest Products Businesses<sup>20</sup>

For a description of the Industry EPW and Income Multipliers see the notes at the beginning of this section.

| Major Forest Products Businesses | Location       | Industry EPW | Income Mult. |
|----------------------------------|----------------|--------------|--------------|
| Plum Creek's Ksanka Mill         | Fortine        | \$43,536     | 1.96         |
| F.H. Stoltze Land & Lumber       | Columbia Falls | \$48,888     | 1.78         |
| Plum Creek Columbia Falls        | Columbia Falls | \$42,771     | 2.03         |
| Plum Creek's Evergreen           | Kalispell      | \$42,771     | 2.03         |
| Plum Creek's Pablo Mill          | Pablo          | \$36,657     | 2.04         |
| Thompson River Lumber Co.        | Thompson Falls | \$28,111     | 1.91         |
| Tricon Timber Inc.               | St. Regis      | \$25,839     | 2.07         |
| Pyramid Mountain Lumber Inc.     | Seeley Lake    | \$37,478     | 1.97         |
| Smurfit-Stone Container          | Missoula       | \$51,021     | 1.8          |
| Rocky Mountain Log Homes         | Hamilton       | \$47,167     | 1.59         |

<sup>20</sup> Montana Wood Products Association, "Forest Facts" *Forest Products Industry in Montana, 2005*.  
[http://www.montanaforests.com/forests/forest\\_info.html](http://www.montanaforests.com/forests/forest_info.html), (Companies that have since shut down were not included)

## Forest Products Industry Breakdown

| NAICS Code | Name  | 2007 Jobs | 2007 EPW  | 2007 LQ |
|------------|---|-----------|-----------|---------|
| 321113     | Sawmills                                      | 1,529     | \$37,906  | 15.32   |
| 113310     | Logging                                       | 744       | \$34,915  | 12.64   |
| 322130     | Paperboard mills                              | 492       | \$109,631 | 13.87   |
| 321219     | Reconstituted wood product manufacturing      | 480       | \$55,547  | 26.02   |
| 321211     | Hardwood veneer and plywood manufacturing     | 469       | \$45,495  | 21.63   |
| 321992     | Prefabricated wood building manufacturing     | 350       | \$43,928  | 14.12   |
| 337110     | Wood kitchen cabinet and countertop mfg.      | 253       | \$28,826  | 1.52    |
| 321911     | Wood window and door manufacturing            | 216       | \$26,708  | 2.91    |
| 115310     | Support activities for forestry               | 214       | \$40,268  | 13.97   |
| 321912     | Cut stock, resawing lumber, and planing       | 190       | \$47,994  | 10.56   |
| 423310     | Lumber and wood merchant wholesalers          | 179       | \$49,642  | 1.35    |
| 321214     | Truss manufacturing                           | 132       | \$27,282  | 2.95    |
| 337122     | Nonupholstered wood household furniture mfg.  | 63        | \$23,974  | 0.97    |
| 321999     | Miscellaneous wood product manufacturing      | 62        | \$17,463  | 2.49    |
| 337127     | Institutional furniture manufacturing         | 44        | \$24,882  | 1.82    |
| 113210     | Forest nursery and gathering forest products  | 40        | \$27,899  | 16.06   |
| 321213     | Engineered wood member manufacturing          | 37        | \$33,621  | 4.34    |
| 321920     | Wood container and pallet manufacturing       | 33        | \$14,076  | 0.58    |
| 113110     | Timber tract operations                       | 31        | \$109,675 | 8.25    |
| 321114     | Wood preservation                             | 28        | \$36,907  | 2.49    |
| 333210     | Sawmill and woodworking machinery             | 19        | \$29,914  | 2.58    |
| 337215     | Showcases, partitions, shelving, and lockers  | 18        | \$41,526  | 0.30    |
| 321918     | Other millwork, including flooring            | <10       | --        | --      |
| 321212     | Softwood veneer and plywood manufacturing     | <10       | --        | --      |
| 322211     | Corrugated and solid fiber box manufacturing  | <10       | --        | --      |
| 337121     | Upholstered household furniture manufacturing | <10       | --        | --      |
|            |   | 5,649     | \$45,590  |         |

## Highest Ranked Counties

| County               | 2007 Jobs | 2007 EPW | 2007 LQ |
|----------------------|-----------|----------|---------|
| Flathead, MT (30029) | 1,925     | \$44,766 | 4.51    |
| Missoula, MT (30063) | 1,844     | \$57,679 | 3.17    |
| Ravalli, MT (30081)  | 735       | \$40,869 | 6.18    |
| Lincoln, MT (30053)  | 466       | \$33,857 | 7.80    |
| Lake, MT (30047)     | 287       | \$31,281 | 3.13    |
| Sanders, MT (30089)  | 215       | \$26,219 | 6.25    |
| Mineral, MT (30061)  | 178       | \$25,790 | 13.53   |

***Industry Sector***

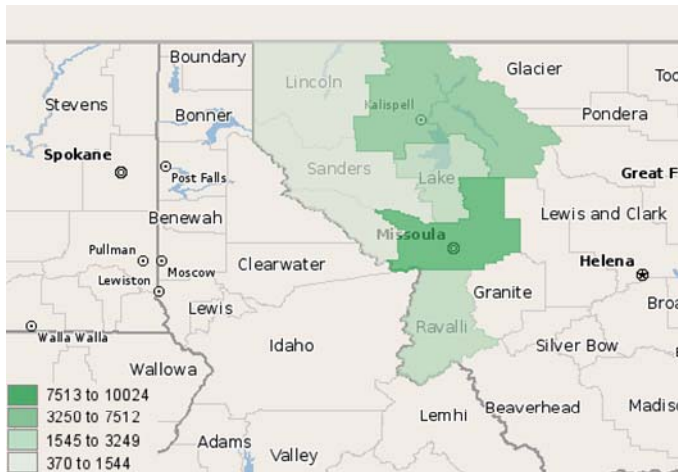
## ***Summary***

- The largest employing sectors in the region are Retail Trade, Government, Healthcare and Construction
- The highest paying sectors are Government, Transportation and Warehousing & Manufacturing. Also the Earnings in privately owned Manufacturing and Agriculture industries are well above the state average.
- Tourism based industries such as Retail Trade, Arts, Entertainment and Recreation, and Accommodation and Food services are projected to have very strong growth
- Although employment in Professional and Technical Services and Information are less concentrated than the national standard, they are both projected to national average growth.
- Within the Manufacturing sector there are several high paying industries that are gaining employment, including machinery and computer manufacturing.
- Missoula County has a large Healthcare sector which pays near the national industry average, and is projected to grow faster than the national average.
- All counties in the region are projected to continuing growing, and Flathead, and Ravalli have very strong growth percentages.

## Government

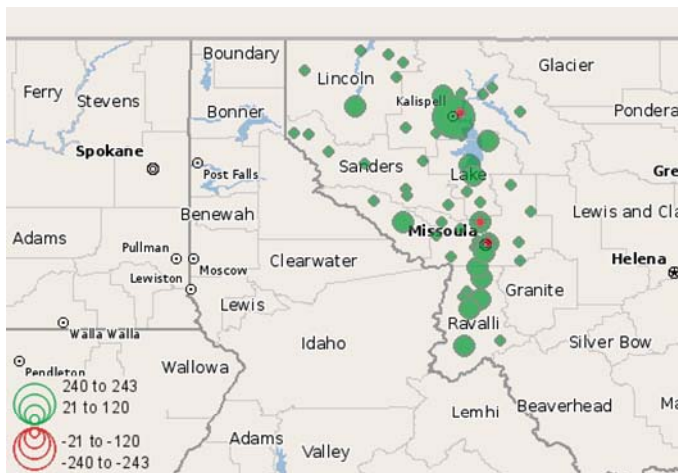
The Public Administration sector consists of establishments of federal, state, and local government agencies that administer, oversee, and manage public programs. Government establishments in the Public Administration sector oversee governmental programs and activities that are not performed by private establishments. Some organizations will show up as government employment that specialize in certain industries but that are funded by the state or local government, such as state funded medical centers and public schools.

### Highest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 10,024    | 0.98    |
| Flathead, MT (30029) | 5,001     | 0.60    |
| Lake, MT (30047)     | 2,901     | 1.46    |
| Ravalli, MT (30081)  | 2,270     | 0.83    |
| Lincoln, MT (30053)  | 1,431     | 1.10    |
| Sanders, MT (30089)  | 755       | 0.96    |
| Mineral, MT (30061)  | 370       | 1.23    |
| Western Montana      | 36,148    | 0.89    |
| State                | 92,646    | 1.08    |
| Nation               | 23,805k   | --      |

### Growth

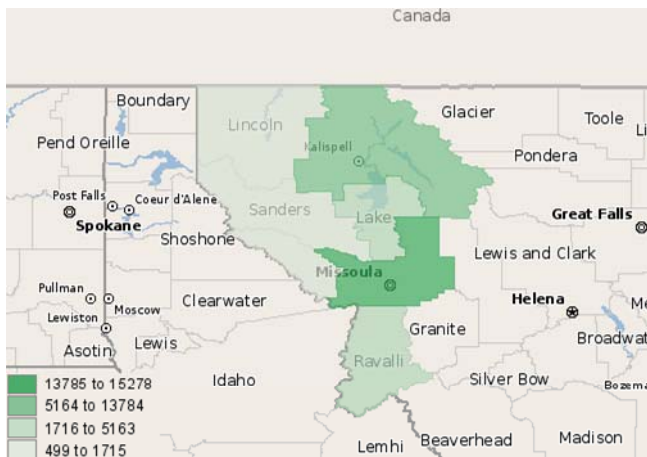


| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 1,565         | 10%      |
| Flathead, MT (30029) | 955           | 8%       |
| Ravalli, MT (30081)  | 388           | 12%      |
| Sanders, MT (30089)  | 173           | 20%      |
| Lake, MT (30047)     | 169           | 7%       |
| Mineral, MT (30061)  | 118           | 24%      |
| Lincoln, MT (30053)  | 90            | 6%       |
| Western Montana      | 3,455         | 10%      |
| State                | 7,229         | 8%       |
| Nation               | 2,247k        | 9%       |

## Tourism

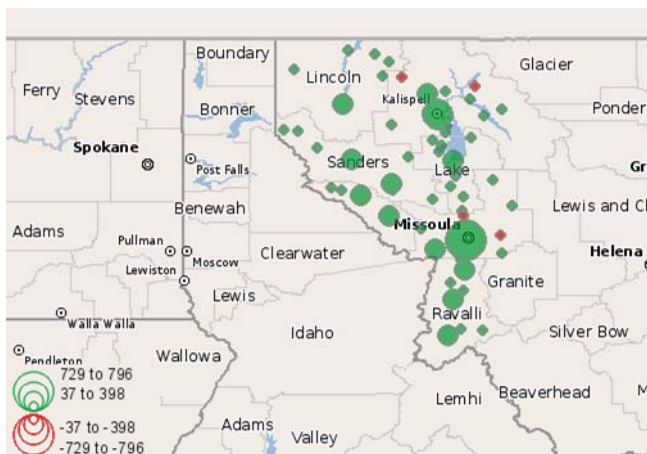
An industry Cluster is a composition of industries from different sectors that are linked through similar market demands. The recreational amenities of the Western Montana region draw thousands of visitors each year. This cluster captures the employment within three different sectors that rely upon this yearly revenue- *Accommodation and Food services* and *Arts, entertainment and recreation* and *Retail trade*. It is important to note however that not all of the employment in these industries is due to visitors. Certain retail outlets and recreation centers are frequented by visitors and residents alike.

### Highest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 15,278    | 1.32    |
| Flathead, MT (30029) | 12,292    | 1.30    |
| Ravalli, MT (30081)  | 3,357     | 1.08    |
| Lake, MT (30047)     | 2,252     | 1.00    |
| Lincoln, MT (30053)  | 1,613     | 1.09    |
| Sanders, MT (30089)  | 858       | 0.96    |
| Mineral, MT (30061)  | 499       | 1.46    |
| Western Montana      | 36,148    | 1.24    |
| State                | 116,852   | 1.20    |
| Nation               | 27,063k   | --      |

### Growth



| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 1,565         | 10%      |
| Flathead, MT (30029) | 955           | 8%       |
| Ravalli, MT (30081)  | 388           | 12%      |
| Sanders, MT (30089)  | 173           | 20%      |
| Lake, MT (30047)     | 169           | 7%       |
| Mineral, MT (30061)  | 118           | 24%      |
| Lincoln, MT (30053)  | 90            | 6%       |
| Western Montana      | 3,459         | 10%      |
| State                | 10,135        | 9%       |
| Nation               | 2,614k        | 10%      |



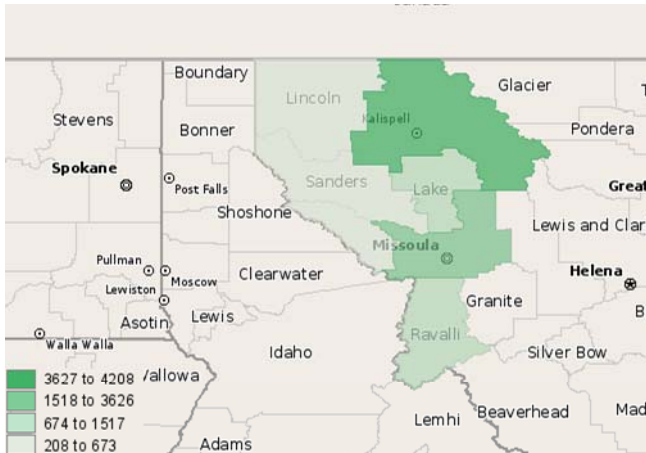
## Detailed Industry Growth

| Description                                  | 2007 Jobs | Five Year Growth | Percentage Growth | 2007 National LQ | Industry Earnings/ Worker |
|--|-----------|------------------|-------------------|------------------|---------------------------|
| Food services and drinking places            | 11,558    | 888              | 8%                | 1.08             | \$13,569                  |
| Accommodation                                | 3,806     | 558              | 15%               | 1.77             | \$20,264                  |
| Amusements, gambling, and recreation         | 3,641     | 346              | 10%               | 1.97             | \$14,423                  |
| Food and beverage stores                     | 3,495     | 398              | 11%               | 1.08             | \$24,769                  |
| General merchandise stores                   | 3,173     | 229              | 7%                | 0.96             | \$25,844                  |
| Nonstore retailers                           | 2,722     | 229              | 8%                | 1.30             | \$10,078                  |
| Motor vehicle and parts dealers              | 2,577     | 88               | 3%                | 1.12             | \$45,264                  |
| Building material and garden supply stores   | 2,459     | 247              | 10%               | 1.65             | \$33,565                  |
| Performing arts and spectator sports         | 2,432     | 330              | 14%               | 1.30             | \$9,978                   |
| Miscellaneous store retailers                | 2,232     | 245              | 11%               | 1.35             | \$20,560                  |
| Sporting goods, hobby, book and music stores | 1,646     | 171              | 10%               | 1.88             | \$16,493                  |
| Gasoline stations                            | 1,634     | 276              | 17%               | 1.69             | \$23,009                  |
| Clothing and clothing accessories stores     | 1,159     | 35               | 3%                | 0.65             | \$17,949                  |
| Health and personal care stores              | 938       | 142              | 15%               | 0.75             | \$30,047                  |
| Furniture and home furnishings stores        | 849       | 36               | 4%                | 1.21             | \$32,219                  |
| Electronics and appliance stores             | 744       | 120              | 16%               | 1.15             | \$30,297                  |
| Museums, historical sites, zoos, and parks   | 43        | (1)              | (2%)              | 0.30             | \$21,715                  |
|  |           |                  |                   |                  |                           |

# Manufacturing

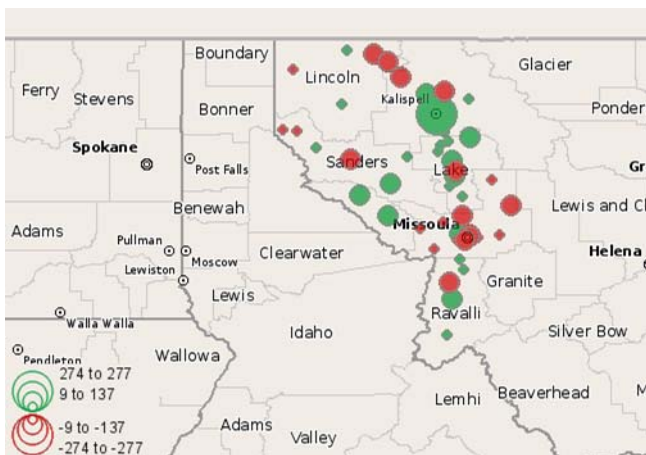
The Manufacturing sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products. The Manufacturing sector includes sawmills and all other wood product transformation industries. It does not include logging, however, which is included in the Agriculture sector.

## Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Flathead, MT (30029) | 4,208     | 0.82    |
| Missoula, MT (30063) | 3,045     | 0.49    |
| Ravalli, MT (30081)  | 1,317     | 0.78    |
| Lake, MT (30047)     | 959       | 0.78    |
| Lincoln, MT (30053)  | 485       | 0.61    |
| Sanders, MT (30089)  | 402       | 0.83    |
| Mineral, MT (30061)  | 208       | 1.13    |
| Western Montana      | 10,624    | 0.67    |
| State                | 24,219    | 0.46    |
| Nation               | 14,632k   | --      |

## Growth



| County               | 5 Year Growth <sup>21</sup> | % Growth |
|----------------------|-----------------------------|----------|
| Flathead, MT (30029) | 179                         | 4%       |
| Lake, MT (30047)     | 61                          | 6%       |
| Mineral, MT (30061)  | 28                          | 13%      |
| Ravalli, MT (30081)  | 12                          | 1%       |
| Sanders, MT (30089)  | -40                         | -10%     |
| Lincoln, MT (30053)  | -82                         | -17%     |
| Missoula, MT (30063) | -237                        | -8%      |
| Western Montana      | -79                         | -0.01%   |
| State                | 720                         | 3%       |
| Nation               | -171,462                    | -1%      |

<sup>21</sup> It is important to note that although overall employment in the Manufacturing sector is declining there is still a good deal of annual openings due to replacement jobs. This data is included in the Workforce Characteristics section under "Production Occupations."

## Employment by Manufacturing Type

| Description                                   | 2007 Jobs | 5 Year Change | Percent Change | 2007 LQ | Median EPW | 2007 Private Establishments |
|---|-----------|---------------|----------------|---------|------------|-----------------------------|
| Wood product manufacturing                    | 3,864     | (458)         | (12%)          | 5.98    | \$48,468   | 107                         |
| Machinery manufacturing                       | 1,130     | 406           | 36%            | 0.86    | \$75,963   | 18                          |
| Food manufacturing                            | 784       | 56            | 7%             | 0.48    | \$31,663   | 51                          |
| Fabricated metal product manufacturing        | 763       | 4             | 1%             | 0.44    | \$37,112   | 75                          |
| Miscellaneous manufacturing                   | 752       | (84)          | (11%)          | 0.95    | \$39,008   | 58                          |
| Furniture and related product manufacturing   | 536       | 47            | 9%             | 0.86    | \$32,760   | 69                          |
| Paper manufacturing                           | 497       | (21)          | (4%)           | 0.98    | \$141,355  | 2                           |
| Primary metal manufacturing                   | 410       | (107)         | (26%)          | 0.80    | \$61,152   | 9                           |
| Nonmetallic mineral product manufacturing     | 366       | 15            | 4%             | 0.64    | \$34,816   | 29                          |
| Printing and related support activities       | 340       | (31)          | (9%)           | 0.46    | \$28,655   | 35                          |
| Computer and electronic product manufacturing | 235       | 84            | 36%            | 0.17    | \$38,883   | 12                          |
| Beverage and tobacco product manufacturing    | 210       | 1             | 0%             | 0.93    | \$46,578   | 13                          |
| Chemical manufacturing                        | 154       | (6)           | (4%)           | 0.16    | \$47,785   | 18                          |
| Plastics and rubber products manufacturing    | 126       | 15            | 12%            | 0.15    | \$32,884   | 10                          |
| Apparel manufacturing                         | 106       | 11            | 10%            | 0.37    | \$19,875   | 6                           |
| Electrical equipment and appliance mfg.       | 97        | (12)          | (12%)          | 0.20    | \$56,926   | 7                           |
| Transportation equipment manufacturing        | 88        | (12)          | (14%)          | 0.05    | \$34,303   | 16                          |
| Leather and allied product manufacturing      | 84        | 14            | 17%            | 1.85    | \$15,595   | 9                           |
| Textile product mills                         | 47        | (11)          | (23%)          | 0.27    | \$22,105   | 11                          |
| Textile mills                                 | 33        | 8             | 24%            | 0.16    | \$49,320   | 6                           |
|   | 10,625    | -80           | -1%            | 0.67    | \$50,451   | 561                         |

# Manufacturing Clusters, Trends and Forecasts

The following are four manufacturing clusters customized for the Western Montana region.

**Consumer Products-** Food, Textiles, Apparel, Printed goods, Miscellaneous goods

**Industrial Use Products-** Machinery, Metals, Minerals, Plastics, rubber, and transportation equipment

**Forest Products-** Sawmills, pulp mills, paper products, lumber and furniture

**Hi-Tech Products-** Chemical, Computer, and Biotech products

## Employment Change

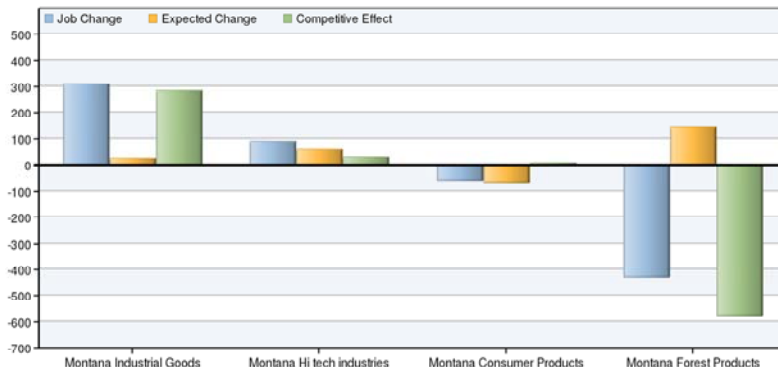
### 2002-2007

| Cluster Name               | 2002 Jobs | 2007 Jobs | Growth | Growth % |
|----------------------------|-----------|-----------|--------|----------|
| Montana Industrial Goods   | 2,583     | 2,965     | 382    | 15%      |
| Montana Consumer Products  | 1,838     | 2,139     | 301    | 16%      |
| Montana Hi tech industries | 548       | 709       | 161    | 29%      |
| Montana Forest Products    | 5,355     | 4,896     | -459   | -9%      |

### 2007-2012

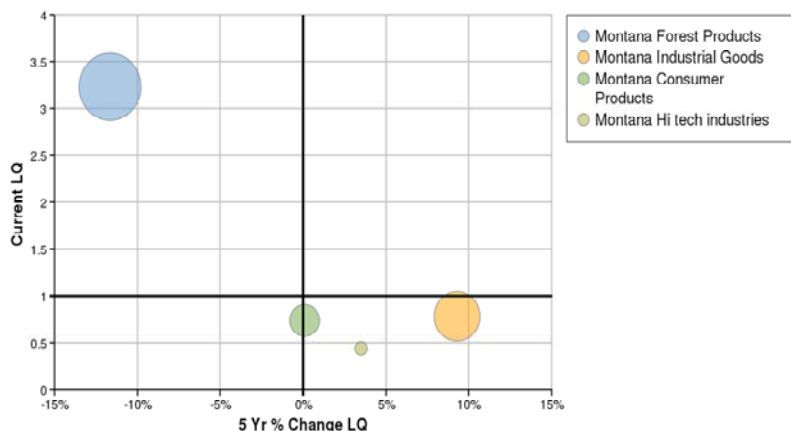
| Cluster Name               | 2007 Jobs | 2012 Jobs | Growth | Growth % |
|----------------------------|-----------|-----------|--------|----------|
| Montana Industrial Goods   | 2,965     | 3,273     | 309    | 10%      |
| Montana Hi tech industries | 709       | 800       | 91     | 13%      |
| Montana Consumer Products  | 2,139     | 2,079     | -60    | -3%      |
| Montana Forest Products    | 4,896     | 4,466     | -431   | -9%      |

## Regional Competitiveness (Shift-Share)



| Cluster Name               | 5 Year Job Change | Expected Change | Competitive Effect (Jobs) |
|----------------------------|-------------------|-----------------|---------------------------|
| Montana Industrial Goods   | 309               | 24              | 285                       |
| Montana Hi tech industries | 91                | 62              | 29                        |
| Montana Consumer Products  | -60               | -67             | 6                         |
| Montana Forest Products    | -431              | 146             | -577                      |

## Location Quotient

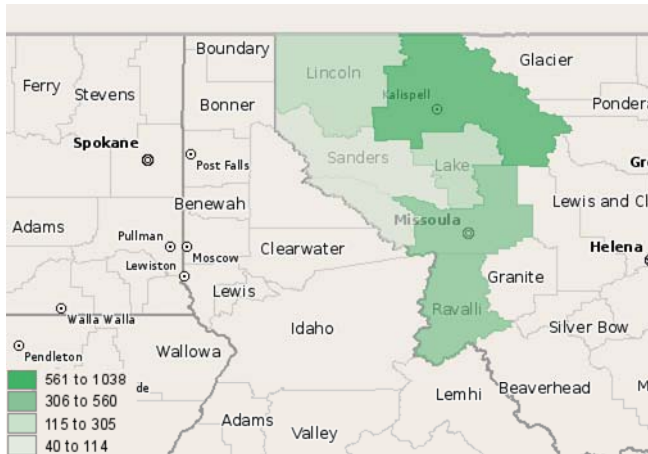


| Cluster Name               | 5 Yr % Change LQ | Current LQ |
|----------------------------|------------------|------------|
| Montana Forest Products    | -12%             | 3.23       |
| Montana Industrial Goods   | 9%               | 0.79       |
| Montana Consumer Products  | 0%               | 0.74       |
| Montana Hi tech industries | 3%               | 0.44       |

## Construction

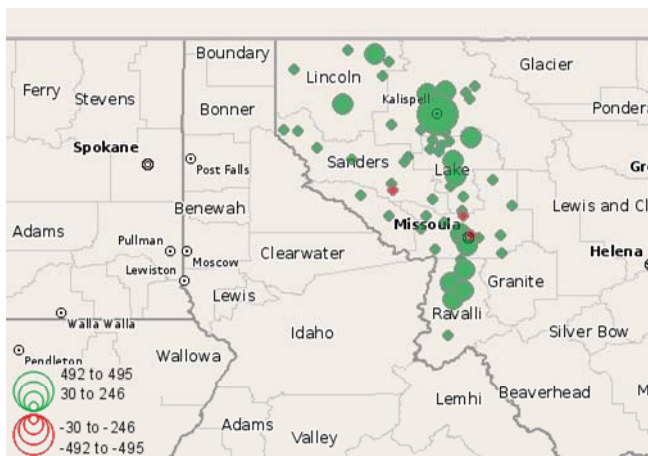
The construction sector comprises establishments primarily engaged in the construction of buildings or engineering projects (e.g., highways and utility systems). Establishments primarily engaged in the preparation of sites for new construction and establishments primarily engaged in subdividing land for sale as building sites also are included in this sector. This sector includes employment for both contractors and subcontractors.

### Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Flathead, MT (30029) | 7,979     | 1.98    |
| Ravalli, MT (30081)  | 2,592     | 1.95    |
| Missoula, MT (30063) | 5,553     | 1.12    |
| Lake, MT (30047)     | 1,449     | 1.50    |
| Lincoln, MT (30053)  | 1,031     | 1.64    |
| Sanders, MT (30089)  | 533       | 1.39    |
| Mineral, MT (30061)  | 200       | 1.38    |
| Western Montana      | 19,337    | 1.55    |
| State                | 56,382    | 1.35    |
| Nation               | 11,546k   | --      |

### Growth



| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Flathead, MT (30029) | 1,037         | 13%      |
| Ravalli, MT (30081)  | 325           | 13%      |
| Missoula, MT (30063) | 321           | 6%       |
| Lake, MT (30047)     | 187           | 13%      |
| Lincoln, MT (30053)  | 146           | 14%      |
| Sanders, MT (30089)  | 84            | 16%      |
| Mineral, MT (30061)  | 40            | 20%      |
| Western Montana      | 2,140         | 11%      |
| State                | 5,678         | 10%      |
| Nation               | 1,231k        | 11%      |

## Home Construction Indicators<sup>22</sup>

### 2006 Home Mortgages

| Area            | Loans Originated for Home Purchase | Loans Through Subprime Lenders | Subprime Percent of Total | Average Loan Amount | Average Applicant Income |
|-----------------|------------------------------------|--------------------------------|---------------------------|---------------------|--------------------------|
| Western Montana | 4,815                              | 233                            | 4.83%                     | \$150,248           | \$65,098                 |
| Montana         | 15,661                             | 716                            | 4.57%                     | \$104,701           | \$64,672                 |
| Nation          | 6,268,420                          | 790,195                        | 12.61%                    | --                  | --                       |

### Building Permits<sup>23</sup>

| Year | Permits for Single Family Residences | Permits for Multi-Family Residences |
|------|--------------------------------------|-------------------------------------|
| 2006 | 997                                  | 270                                 |
| 2005 | 1,173                                | 424                                 |
| 2004 | 937                                  | 524                                 |
| 2003 | 840                                  | 700                                 |
| 2002 | 756                                  | 992                                 |

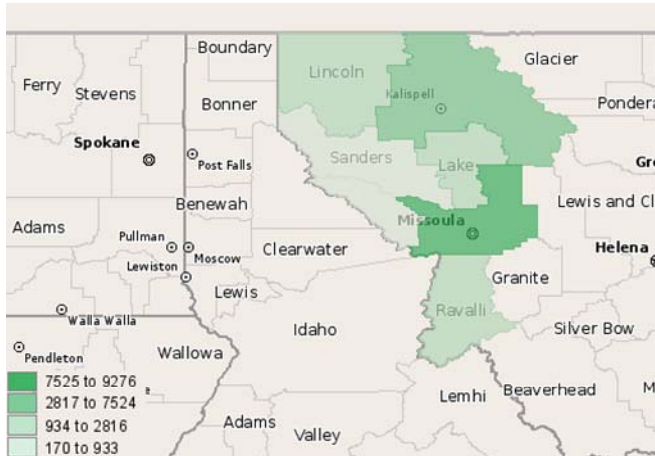
<sup>22</sup> Federal Financial Institutions Examination Council, Home Mortgage Disclosure Act, [http://www.ffiec.gov/HMDA/online\\_rpts.htm](http://www.ffiec.gov/HMDA/online_rpts.htm)

<sup>23</sup> US Census Bureau, Building Permits data, <http://censtats.census.gov/bldg/bldgprmt.shtml>

## Health Care and Social Assistance Sector

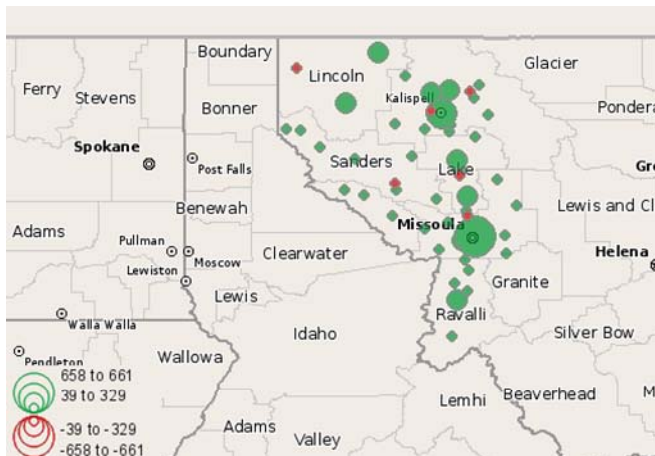
The Health Care and Social Assistance sector comprises establishments providing health care and social assistance for individuals. The sector includes both health care and social assistance because it is sometimes difficult to distinguish between the boundaries of these two activities.

### Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 9,276     | 1.23    |
| Flathead, MT (30029) | 5,774     | 0.94    |
| Lincoln, MT (30053)  | 1,037     | 1.08    |
| Ravalli, MT (30081)  | 1,563     | 0.77    |
| Sanders, MT (30089)  | 552       | 0.94    |
| Mineral, MT (30061)  | 170       | 0.77    |
| Lake, MT (30047)     | 1,349     | 0.92    |
| Western Montana      | 19,721    | 1.04    |
| State                | 64,672    |         |
| Nation               | 17,639k   | --      |

### Growth



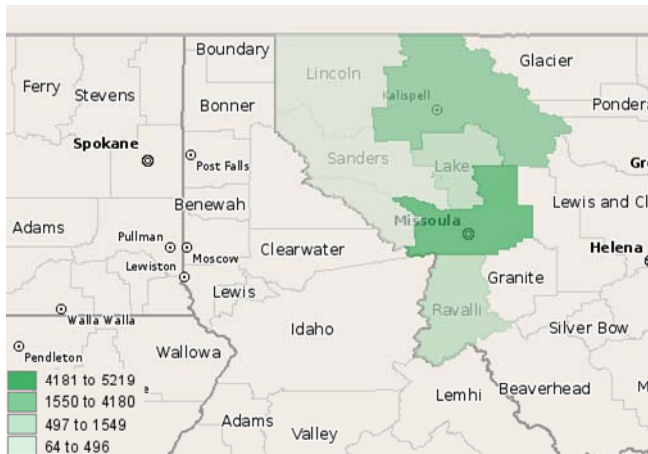
| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 1,348         | 15%      |
| Flathead, MT (30029) | 797           | 14%      |
| Lincoln, MT (30053)  | 163           | 16%      |
| Ravalli, MT (30081)  | 111           | 7%       |
| Sanders, MT (30089)  | 37            | 7%       |
| Mineral, MT (30061)  | 31            | 18%      |
| Lake, MT (30047)     | 20            | 1%       |
| Western Montana      | 2,507         | 13%      |
| State                | 8,367         | 13%      |
| Nation               | 2,295k        | 13%      |



## Professional and Technical Services

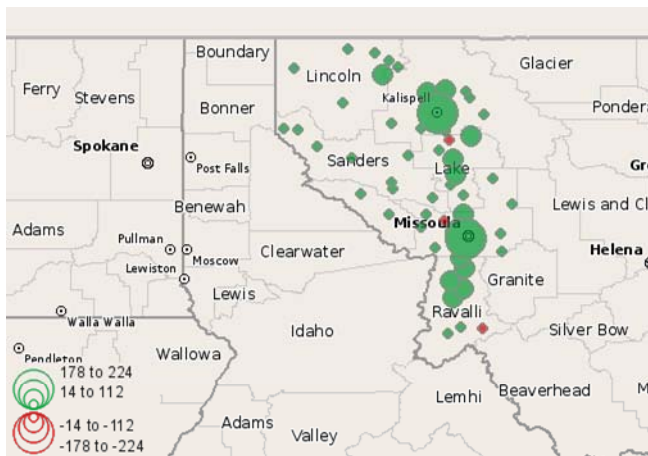
The Professional, Scientific, and Technical Services sector comprises establishments that specialize in performing professional, scientific, and technical activities for others. These activities require a high degree of expertise and training. The establishments in this sector specialize according to expertise and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include: legal advice and representation; accounting, bookkeeping, and payroll services; architectural, engineering, and specialized design services; computer services; consulting services; research services; advertising services; photographic services; translation and interpretation services; veterinary services; and other professional, scientific, and technical services.

### Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 5,219     | 1.02    |
| Flathead, MT (30029) | 3,143     | 0.75    |
| Ravalli, MT (30081)  | 1,262     | 0.92    |
| Lake, MT (30047)     | 676       | 0.68    |
| Lincoln, MT (30053)  | 311       | 0.48    |
| Sanders, MT (30089)  | 173       | 0.44    |
| Mineral, MT (30063)  | 64        | 0.42    |
| Western Montana      | 10,848    | 0.84    |
| State                | 35,019    | 0.81    |
| Nation               | 11,956k   | --      |

### Growth



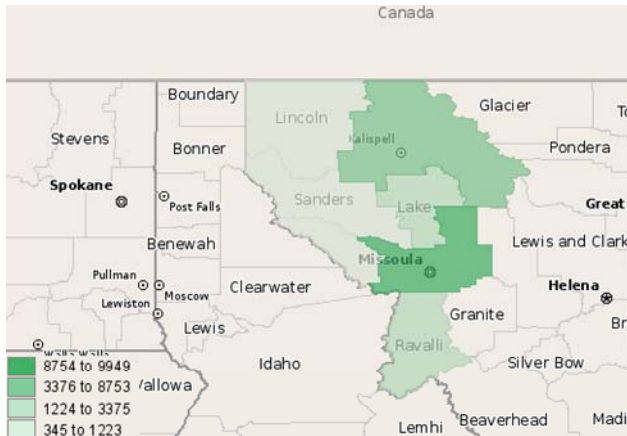
| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 525           | 10%      |
| Flathead, MT (30029) | 294           | 9%       |
| Ravalli, MT (30081)  | 152           | 12%      |
| Lake, MT (30047)     | 78            | 12%      |
| Sanders, MT (30089)  | 18            | 10%      |
| Lincoln, MT (30053)  | 11            | 3%       |
| Mineral, MT (30061)  | 8             | 14%      |
| Western Montana      | 1,086         | 10%      |
| State                | 3,474         | 10%      |
| Nation               | 1,164k        | 10%      |



## Retail Trade Sector

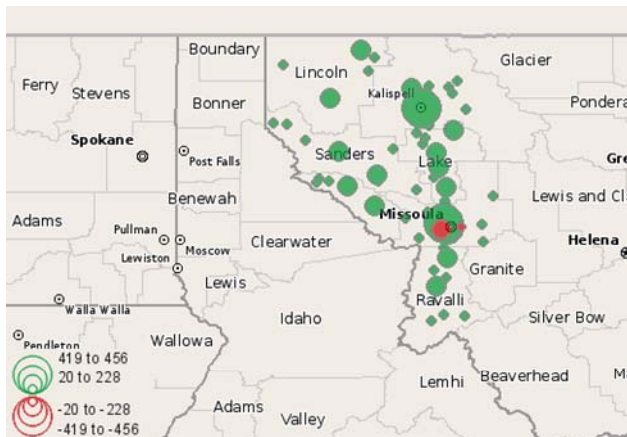
The Retail Trade sector comprises establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.

### Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 9,949     | 1.23    |
| Flathead, MT (30029) | 7,560     | 1.15    |
| Ravalli, MT (30081)  | 2,343     | 1.08    |
| Lake, MT (30047)     | 1,634     | 1.04    |
| Lincoln, MT (30053)  | 1,210     | 1.18    |
| Sanders, MT (30089)  | 589       | 0.94    |
| Mineral, MT (30061)  | 345       | 1.45    |
| Western Montana      | 23,630    | 1.16    |
| State                | 23,630    |         |
| Nation               | 18,837k   | --      |

### Growth

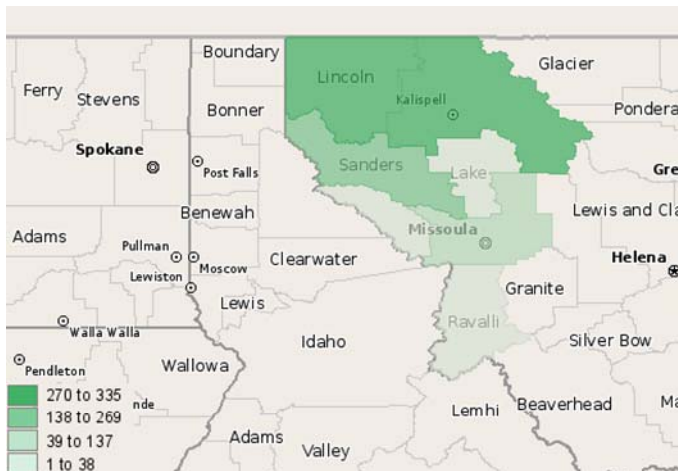


| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 878           | 9%       |
| Flathead, MT (30029) | 588           | 8%       |
| Ravalli, MT (30081)  | 255           | 11%      |
| Lake, MT (30047)     | 160           | 10%      |
| Lincoln, MT (30053)  | 125           | 10%      |
| Sanders, MT (30089)  | 108           | 18%      |
| Mineral, MT (30061)  | 100           | 29%      |
| Western Montana      | 2,208         | 9%       |
| State                | 5,695         | 8%       |
| Nation               | 1,341k        | 7%       |

# Mining

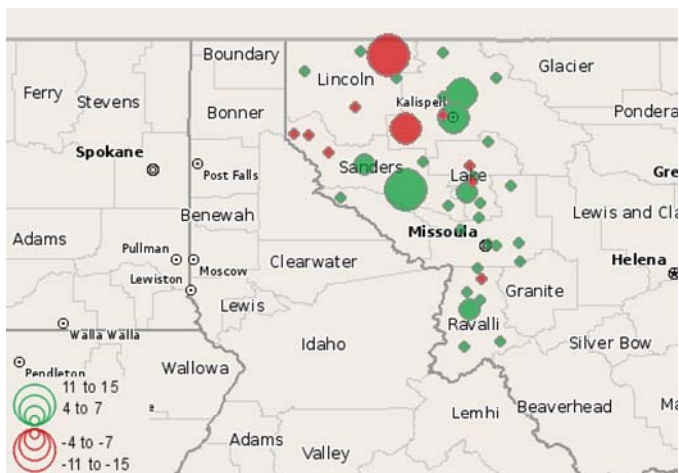
The Mining sector comprises establishments that extract naturally occurring mineral solids, such as coal and ores; liquid minerals, such as crude petroleum; and gases, such as natural gas. The term mining is used in the broad sense to include quarrying, well operations, beneficiating (e.g., crushing, screening, washing, and flotation), and other preparation customarily performed at the mine site, or as a part of mining activity.

## Highest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Flathead, MT (30029) | 335       | 1.04    |
| Lincoln, MT (30053)  | 324       | 6.42    |
| Sanders, MT (30089)  | 151       | 4.91    |
| Missoula, MT (30063) | 88        | 0.22    |
| Ravalli, MT (30081)  | 38        | 0.36    |
| Lake, MT (30047)     | 31        | 0.40    |
| Mineral, MT (30061)  | <10       | --      |
| Western Montana      | 967       | 0.97    |
| State                | 9,406     | 2.82    |
| Nation               | 925,554   | --      |

## Growth<sup>24</sup>



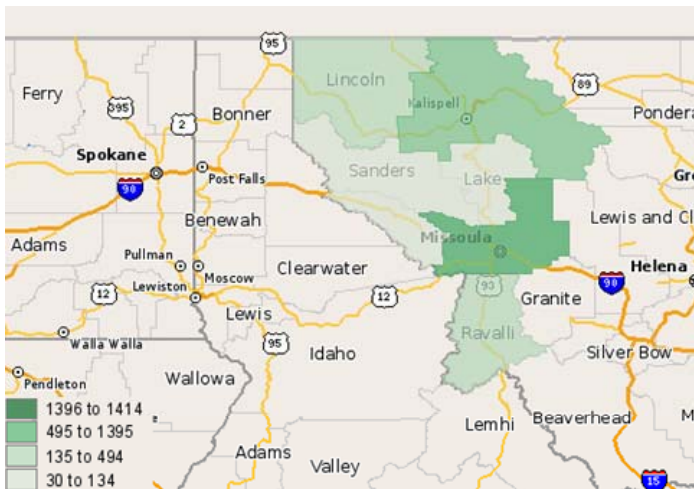
| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Sanders, MT (30089)  | 17            | 11%      |
| Flathead, MT (30029) | 10            | 3%       |
| Lake, MT (30047)     | 1             | 3%       |
| Missoula, MT (30063) | 0             | 1%       |
| Ravalli, MT (30081)  | 0             | 1%       |
| Mineral, MT (30061)  | --            | --       |
| Lincoln, MT (30053)  | -15           | -5%      |
| Western Montana      | 15            | 2%       |
| State                | 436           | 5%       |
| Nation               | 96,510        | 10%      |

<sup>24</sup> The latest long-term projection from the Montana Department of Labor and Industry forecast a 40% state-wide increase in Mining employment over the next ten years. EMSI's projections will integrate these projections in the September data update. For now, the data displayed here should be seen as a very conservative estimate.

## Arts, Entertainment and Recreation

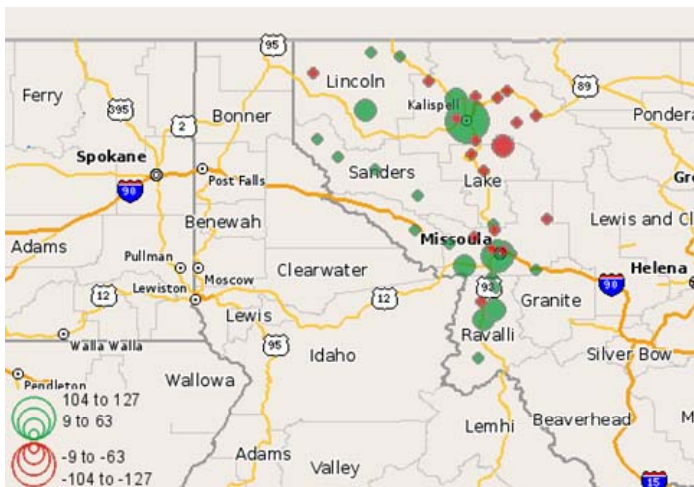
The Arts, Entertainment, and Recreation sector includes a wide range of establishments that operate facilities or provide services to meet varied cultural, entertainment, and recreational interests of their patrons. This sector comprises industries that specialize in (1) producing, promoting, or participating in live performances, events, or exhibits (2) preserve and exhibit objects and sites of historical, cultural, or educational interest; and (3) provide services that enable patrons to participate in recreational activities.

### Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 2,593     | 1.69    |
| Flathead, MT (30029) | 2,169     | 1.73    |
| Ravalli, MT (30081)  | 684       | 1.66    |
| Lake, MT (30047)     | 228       | 1.17    |
| Lincoln, MT (30053)  | 285       | 0.95    |
| Mineral, MT (30061)  | 95        | 0.80    |
| Sanders, MT (30089)  | 62        | 1.38    |
| Western Montana      | 6,116     | 1.59    |
| State                | 18,981    | 1.47    |
| Nation               | 3,582k    | --      |

### Growth

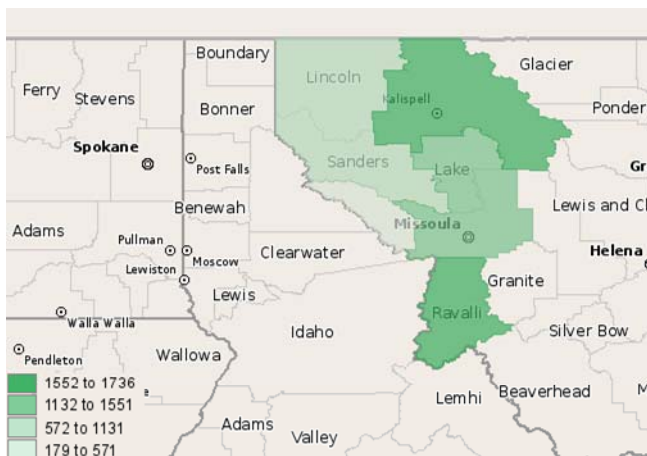


| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 310           | 12%      |
| Flathead, MT (30029) | 180           | 8%       |
| Ravalli, MT (30081)  | 94            | 14%      |
| Lake, MT (30047)     | 28            | 10%      |
| Lincoln, MT (30053)  | 26            | 12%      |
| Mineral, MT (30061)  | 21            | 34%      |
| Sanders, MT (30089)  | 16            | 16%      |
| Western Montana      | 675           | 11%      |
| State                | 2,447         | 13%      |
| Nation               | 470,447       | 13%      |

## Agriculture, Forestry, Fishing and Hunting

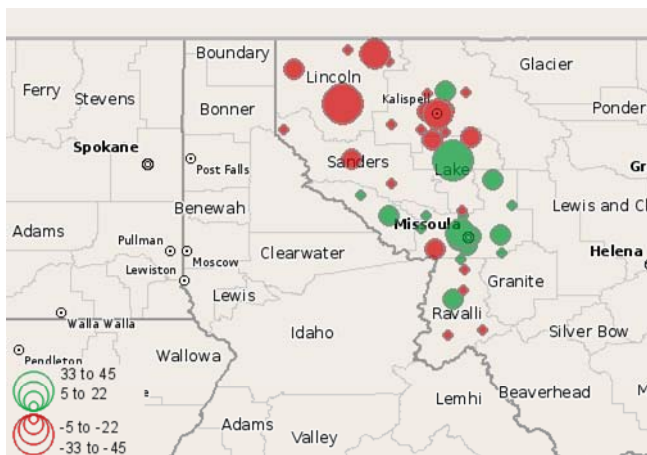
The Agriculture, Forestry, Fishing and Hunting sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, and harvesting fish and other animals from a farm, ranch, or their natural habitats.

### Highest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Flathead, MT (30029) | 1,736     | 1.30    |
| Ravalli, MT (30081)  | 1,599     | 3.64    |
| Lake, MT (30047)     | 1,440     | 4.51    |
| Missoula, MT (30063) | 1,433     | 0.88    |
| Lincoln, MT (30053)  | 792       | 3.81    |
| Sanders, MT (30089)  | 745       | 5.88    |
| Mineral, MT (30061)  | 179       | 3.71    |
| Western Montana      | 7,924     | 1.93    |
| State                | 36,609    |         |
| Nation               | 3,818k    | --      |

### Growth



| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 84            | 6%       |
| Lake, MT (30047)     | 28            | 2%       |
| Mineral, MT (30061)  | 9             | 5%       |
| Ravalli, MT (30081)  | 3             | 0%       |
| Sanders, MT (30089)  | -10           | -1%      |
| Flathead, MT (30029) | -47           | -3%      |
| Lincoln, MT (30053)  | -85           | -11%     |
| Western Montana      | -17           | 0%       |
| State                | 1,012         | 2.87     |
| Nation               | -55,476       | -1%      |



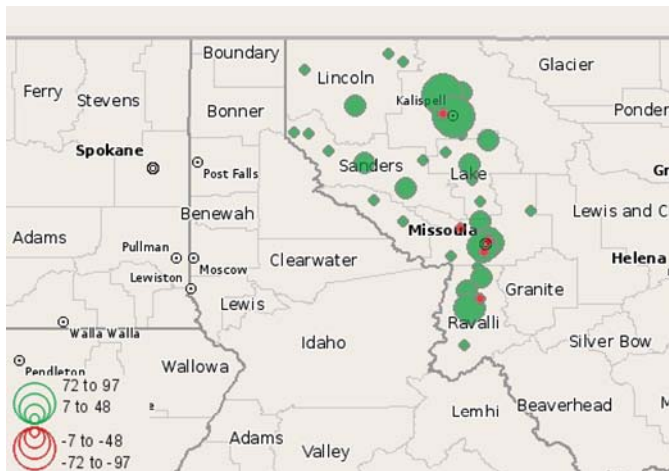
## Finance and Insurance Sector

The Finance and Insurance sector comprises establishments primarily engaged in financial transactions (transactions involving the creation, liquidation, or change in ownership of financial assets) and/or in facilitating financial transactions. This sector comprises industries that specialize in (1) financial intermediation (2) underwriting insurance and annuities and (3) providing specialized services for facilitating financial activity.

### Highest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Flathead, MT (30029) | 2,635     | 0.89    |
| Missoula, MT (30063) | 2,623     | 0.72    |
| Ravalli, MT (30081)  | 628       | 0.64    |
| Sanders, MT (30089)  | 125       | 0.44    |
| Lake, MT (30047)     | 445       | 0.63    |
| Lincoln, MT (30053)  | 204       | 0.44    |
| Mineral, MT (30061)  | 27        | 0.25    |
| Western Montana      | 6,686     | 0.73    |
| State                | 22,987    | 0.75    |
| Nation               | 8,508k    | --      |



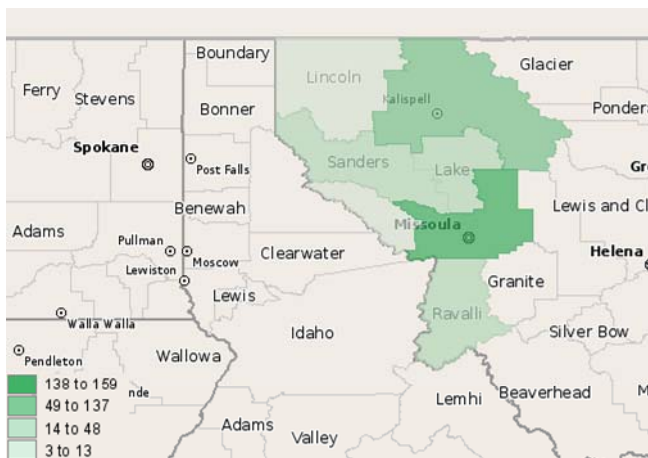
| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Flathead, MT (30029) | 214           | 8%       |
| Missoula, MT (30063) | 140           | 5%       |
| Ravalli, MT (30081)  | 73            | 12%      |
| Sanders, MT (30089)  | 33            | 26%      |
| Lake, MT (30047)     | 28            | 6%       |
| Lincoln, MT (30053)  | 23            | 12%      |
| Mineral, MT (30061)  | 6             | 23%      |
| Western Montana      | 519           | 8%       |
| State                | 22,987        | 11%      |
| Nation               | 931,469       | 11%      |

## Information

The Information sector comprises establishments engaged in the following processes: (a) producing and distributing information and cultural products, (b) providing the means to transmit or distribute these products as well as data or communications, and (c) processing data.

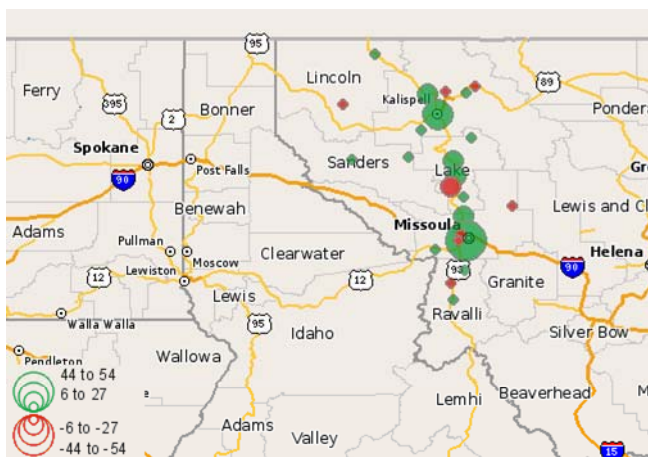
The main components of this sector are the publishing industries, including software publishing, and both traditional publishing and publishing exclusively on the Internet; the motion picture and sound recording industries; the broadcasting industries, including traditional broadcasting and those broadcasting exclusively over the Internet; the telecommunications industries; the industries known as Internet service providers and web search portals, data processing industries, and the information services industries.

### Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 9,276     | 0.99    |
| Flathead, MT (30029) | 5,774     | 0.72    |
| Ravalli, MT (30081)  | 1,037     | 0.46    |
| Lake, MT (30047)     | 1,563     | 0.55    |
| Sanders, MT (30089)  | 552       | 0.54    |
| Lincoln, MT (30053)  | 170       | 0.58    |
| Mineral, MT (30061)  | 10        | --      |
| Western Montana      | 2,971     | 0.77    |
| State                | 9,513     | 0.73    |
| Nation               | 3,591K    | --      |

### Growth

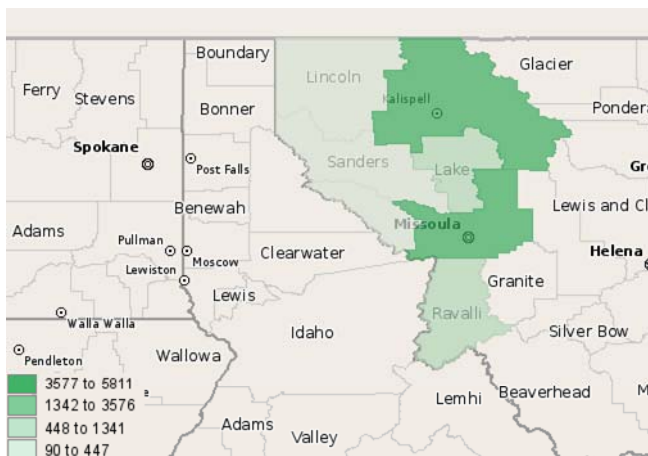


| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 159           | 10%      |
| Flathead, MT (30029) | 116           | 13%      |
| Ravalli, MT (30081)  | 23            | 12%      |
| Lake, MT (30047)     | 19            | 12%      |
| Sanders, MT (30089)  | 17            | 27%      |
| Lincoln, MT (30053)  | 8             | 7%       |
| Mineral, MT (30061)  | --            | --       |
| Western Montana      | 346           | 12%      |
| State                | 10,845        | 14%      |
| Nation               | 306,015       | 9%       |

## Real Estate, Rental and Leasing

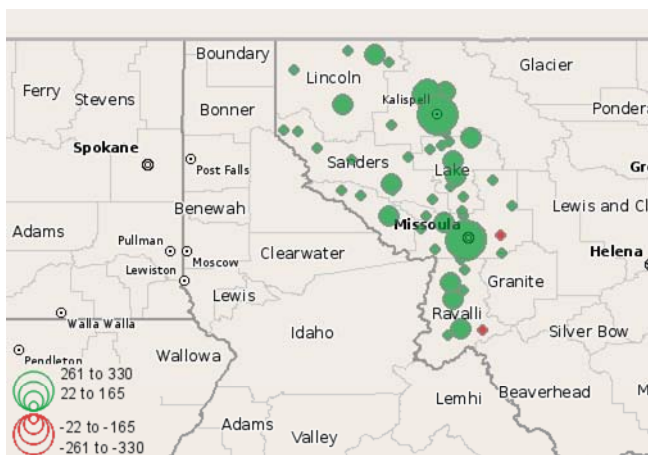
The Real Estate and Rental and Leasing sector comprises establishments primarily engaged in renting, leasing, or otherwise allowing the use of tangible or intangible assets, and establishments providing related services. The major portion of this sector comprises establishments that rent, lease, or otherwise allow the use of their own assets by others. The assets may be tangible, as is the case of real estate and equipment, or intangible, as is the case with patents and trademarks.

### Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 3,578     | 1.10    |
| Flathead, MT (30029) | 3,577     | 1.35    |
| Ravalli, MT (30081)  | 961       | 1.10    |
| Lake, MT (30047)     | 536       | 0.84    |
| Lincoln, MT (30053)  | 420       | 1.01    |
| Sanders, MT (30089)  | 232       | 0.92    |
| Mineral, MT (30061)  | 90        | 0.94    |
| Western Montana      | 9,394     | 1.15    |
| State                | 26,102    | 0.95    |
| Nation               | 7,600k    | --      |

### Growth

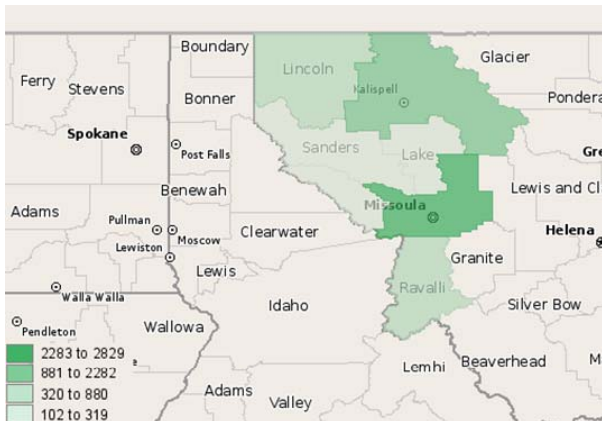


| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Flathead, MT (30029) | 743           | 21%      |
| Missoula, MT (30063) | 704           | 20%      |
| Ravalli, MT (30081)  | 243           | 25%      |
| Lake, MT (30047)     | 139           | 26%      |
| Lincoln, MT (30053)  | 99            | 24%      |
| Sanders, MT (30089)  | 55            | 24%      |
| Mineral, MT (30061)  | 36            | 40%      |
| Western Montana      | 2,019         | 22%      |
| State                | 5,342         | 20%      |
| Nation               | 1,704k        | 22%      |

## Transportation and Warehousing

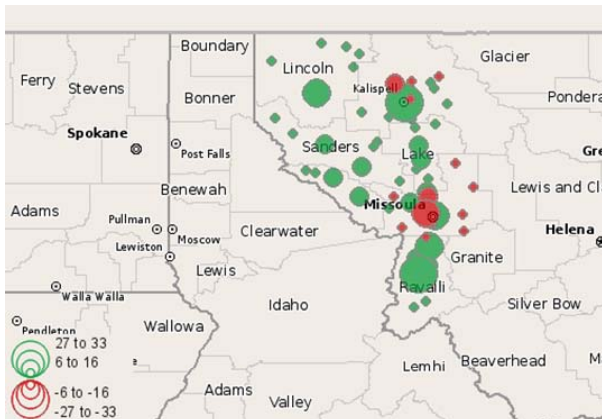
The Transportation and Warehousing sector includes industries providing transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation. Establishments in these industries use transportation equipment or transportation related facilities as a productive asset. The type of equipment depends on the mode of transportation. The modes of transportation are air, rail, water, road, and pipeline.

### Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 2,829     | 1.00    |
| Flathead, MT (30029) | 1,736     | 0.75    |
| Ravalli, MT (30081)  | 625       | 0.82    |
| Lincoln, MT (30053)  | 343       | 0.95    |
| Lake, MT (30047)     | 316       | 0.57    |
| Sanders, MT (30089)  | 213       | 0.98    |
| Mineral, MT (30061)  | 102       | 1.23    |
| Western Montana      | 6,164     | 0.87    |
| State                | 21,906    | 0.92    |
| Nation               | 6,595k    | --      |

### Growth



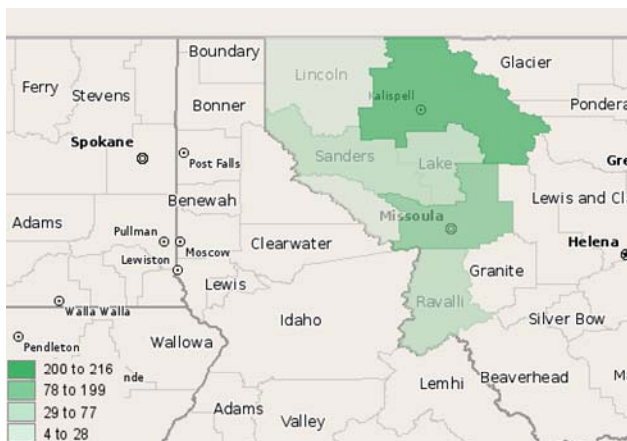
| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Ravalli, MT (30081)  | 73            | 12%      |
| Lake, MT (30047)     | 33            | 11%      |
| Sanders, MT (30089)  | 29            | 13%      |
| Lincoln, MT (30053)  | 28            | 8%       |
| Mineral, MT (30061)  | 22            | 21%      |
| Flathead, MT (30029) | 17            | 1%       |
| Missoula, MT (30063) | -21           | -1%      |
| Western Montana      | 181           | 3%       |
| State                | 1,320         | 6%       |
| Nation               | 508,063       | 8%       |



## Utilities

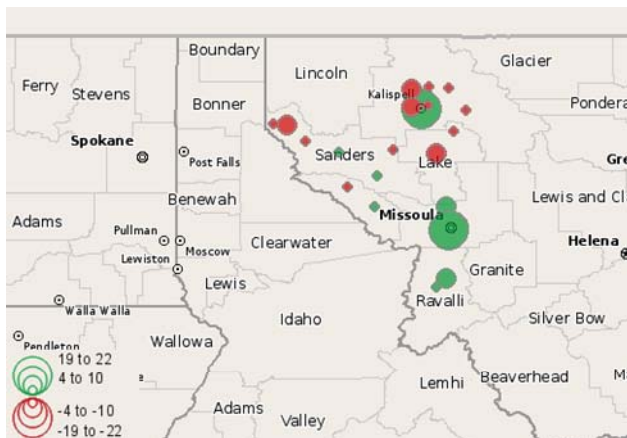
The Utilities sector comprises establishments engaged in the provision of the following utility services: electric power, natural gas, steam supply, water supply, and sewage removal. Within this sector, the specific activities associated with the utility services provided vary by utility: electric power includes generation, transmission, and distribution; natural gas includes distribution; steam supply includes provision and/or distribution; water supply includes treatment and distribution; and sewage removal includes collection, treatment, and disposal of waste through sewer systems and sewage treatment facilities.

### Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Flathead, MT (30029) | 216       | 1.08    |
| Missoula, MT (30063) | 183       | 0.74    |
| Ravalli, MT (30081)  | 48        | 0.72    |
| Sanders, MT (30089)  | 45        | 2.37    |
| Lake, MT (30047)     | 44        | 0.92    |
| Mineral, MT (30061)  | <10       | --      |
| Lincoln, MT (30053)  | <10       | --      |
| Western Montana      | 546       | 0.88    |
| State                | 3,121     | 1.51    |
| Nation               | 574,593   | --      |

### Growth

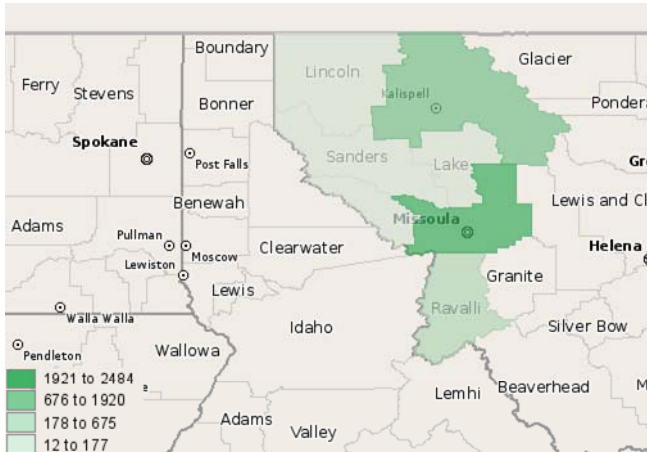


| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 39            | 21%      |
| Ravalli, MT (30081)  | 6             | 13%      |
| Flathead, MT (30029) | 4             | 2%       |
| Lincoln, MT (30053)  | --            | --       |
| Mineral, MT (30061)  | --            | --       |
| Sanders, MT (30089)  | -3            | -7%      |
| Lake, MT (30047)     | -7            | -17%     |
| Western Montana      | 38            | 7%       |
| State                | -158          | -5%      |
| Nation               | -9,535        | -2%      |

## Wholesale Trade

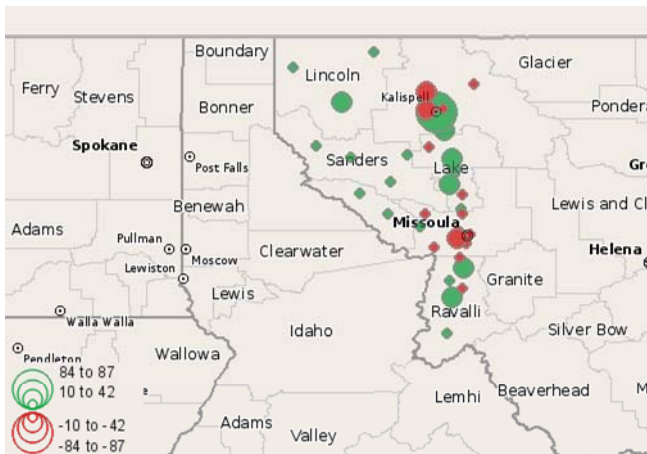
The Wholesale Trade sector comprises establishments engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The merchandise described in this sector includes the outputs of agriculture, mining, manufacturing, and certain information industries, such as publishing.

### Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Flathead, MT (30029) | 485       | 0.64    |
| Missoula, MT (30063) | 1,358     | 0.59    |
| Ravalli, MT (30081)  | 177       | 0.32    |
| Sanders, MT (30089)  | 109       | 0.31    |
| Lake, MT (30047)     | 106       | 0.49    |
| Mineral, MT (30061)  | 12        | 0.15    |
| Lincoln, MT (30053)  | 2,484     | 0.88    |
| Western Montana      | 4,731     | 0.67    |
| State                | 18,877    | 0.80    |
| Nation               | 6,561k    | --      |

### Growth

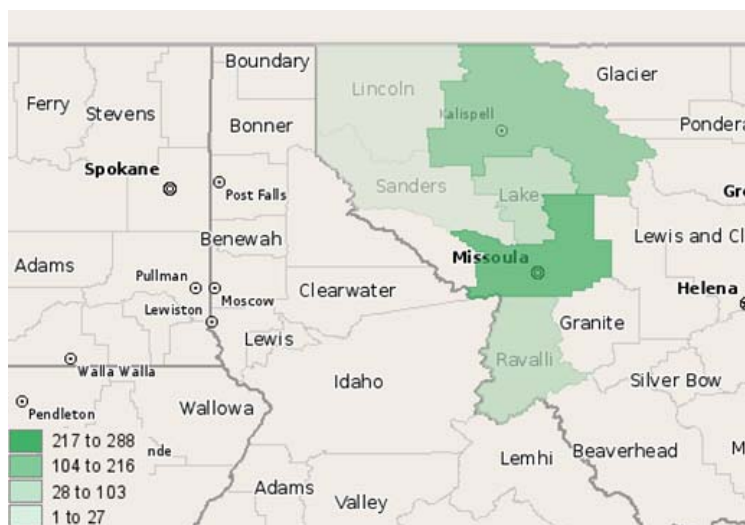


| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Ravalli, MT (30081)  | 61            | 13%      |
| Flathead, MT (30029) | 57            | 4%       |
| Lake, MT (30047)     | 25            | 14%      |
| Lincoln, MT (30053)  | 19            | 17%      |
| Sanders, MT (30089)  | 17            | 16%      |
| Mineral, MT (30061)  | 4             | 34%      |
| Missoula, MT (30063) | -8            | -0%      |
| Western Montana      | 174           | 4%       |
| State                | 390           | 2%       |
| Nation               | 386,117       | 6%       |

# Management of Companies and Enterprises

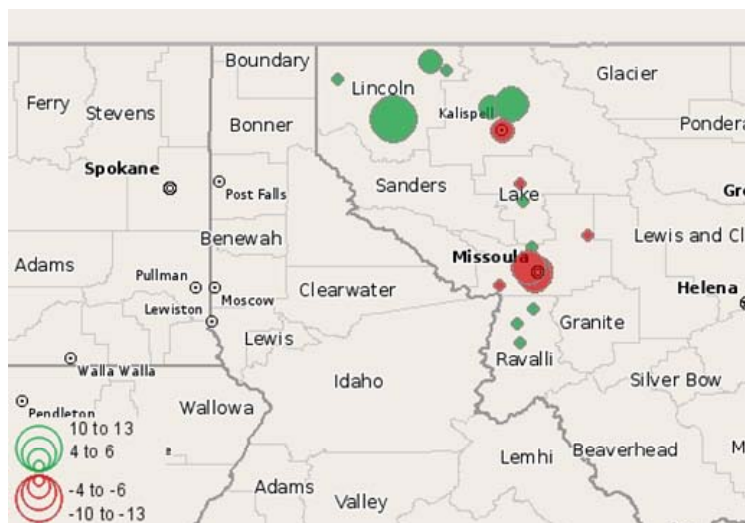
The Management of Companies and Enterprises sector comprises (1) establishments that hold the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing management decisions or (2) establishments (except government establishments) that administer, oversee, and manage establishments of the company or enterprise and that normally undertake the strategic or organizational planning and decision making role of the company or enterprise. Management establishments tend to be located in metropolitan areas, unless the company is owned and operated regionally. Employment in this sector is significant because it is a high paying and influential to the direction of the local economy.

## Largest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 288       | 0.35    |
| Flathead, MT (30029) | 147       | 0.22    |
| Lake, MT (30047)     | 30        | 0.19    |
| Ravalli, MT (30081)  | 28        | 0.13    |
| Lincoln, MT (30053)  | 27        | 0.26    |
| Sanders, MT (30089)  | 0         | --      |
| Mineral, MT (30063)  | 0         | --      |
| Western Montana      | 520       | 0.25    |
| State                | 1,523     | 0.22    |
| Nation               | 1.916K    | --      |

## Growth



| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Lincoln, MT (30053)  | 17            | 64%      |
| Flathead, MT (30029) | 7             | 5%       |
| Ravalli, MT (30081)  | 5             | 17%      |
| Lake, MT (30047)     | 0             | 1%       |
| Sanders, MT (30089)  | 0             | 0%       |
| Missoula, MT (30063) | (31)          | (10%)    |
| Mineral, MT (30061)  | --            | --       |
| Western Montana      | 346           | 0.01%    |
| State                | 261           | 17%      |
| Nation               | 161,295       | 8%       |

## Workforce Characteristics

A competent workforce is the foundation of a thriving economy. When businesses consider potential sites, their first consideration is whether the region can supply their workforce needs. Because of this, it is vitally important for regions to know their workforce strengths and how to market them to potential industries. Key high-skill occupations that are vital to many industries include Architecture and Engineering, Business and Financial Operations, Computer and Mathematical Science, Life, Physical, and Social Science, Management, and in some cases, Production occupations.

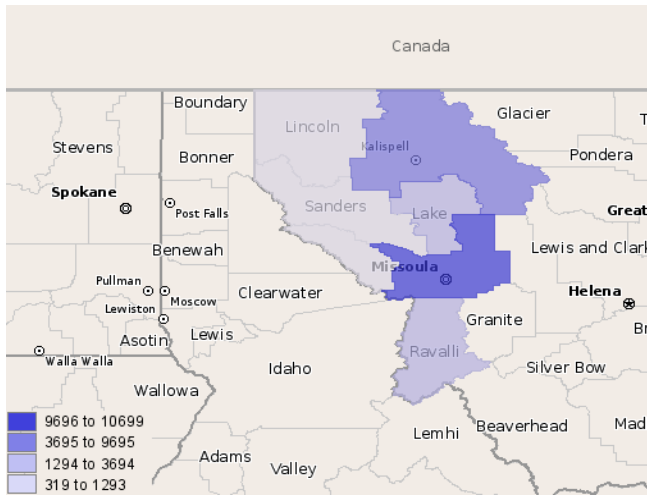
Similarly, Knowledge Competencies identify areas where there is an above average (in this case above a location quotient of 1), level of knowledge in key industry related areas. Competency location quotients are calculated using O\*NET data from the U.S. Department of Labor. See Appendix A for more detail.

### ***Workforce Characteristics Summary:***

- The region has a strong base of healthcare jobs, particularly in Missoula and Flathead Counties. These occupations pay roughly \$24/ hour on average and are projected to grow at 13% over the next five years.
- Architecture and Engineering Occupations are projected to grow at 17% over the next five years, which a percentage point more than the state average and nearly twice that of the national average.
- Sales and Related Occupations is one of the most concentrated groups in Western Montana and is projected to continue growing, particularly in the rural counties of Lake, Lincoln, Sanders and Mineral.
- The Percentage growth numbers for Ravalli County are consistently stronger than the regional average, indicating that it is emerging as another regional economic hub.
- Educational output for much of the region shows high graduation rates for high schools, when compared to national averages.
- Of the higher education institution enrollment in the Fall of 2007, only 26% of the students needed some form of remediation classes.
- The growth rate of college degree attainment for the 25+ year old population is expected to exceed 10% over the next five years, totaling over 6,700 additional educated workers.

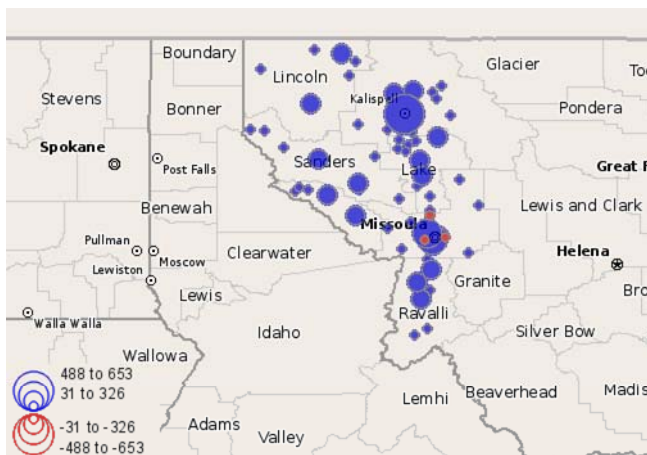
# Sales and Related Occupations

## Highest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 10,699    | 1.07    |
| Flathead, MT (30029) | 8,694     | 1.07    |
| Ravalli, MT (30081)  | 2,649     | 0.99    |
| Lake, MT (30047)     | 1,616     | 0.83    |
| Lincoln, MT (30053)  | 1,227     | 0.97    |
| Sanders, MT (30089)  | 659       | 0.86    |
| Mineral, MT (30061)  | 319       | 1.09    |
| Western Montana      | 25,864    | 1.03    |
| State                | 82,404    | 0.98    |
| Nation               | 23,236k   | N/A     |

## Growth



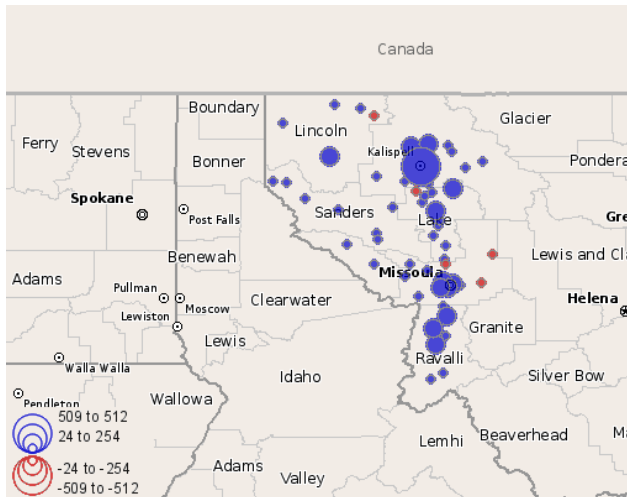
| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 1,124         | 11%      |
| Flathead, MT (30029) | 1,060         | 12%      |
| Ravalli, MT (30081)  | 383           | 14%      |
| Lake, MT (30047)     | 222           | 14%      |
| Lincoln, MT (30053)  | 163           | 13%      |
| Sanders, MT (30089)  | 131           | 20%      |
| Mineral, MT (30061)  | 97            | 30%      |
| Western Montana      | 3,179         | 12%      |
| State                | 9,257         | 11%      |
| Nation               | 2,664k        | 11%      |

## Highest Growth Categories

| SOC Code | Name  | 2007 Jobs | 5 Year Growth | % Growth | 2007 Hourly Earnings |
|----------|---|-----------|---------------|----------|----------------------|
| 41-9020  | Real estate brokers and sales agents  | 4,504     | 1,128         | 25%      | \$14.74              |
| 41-2030  | Retail salespersons   | 6,766     | 755           | 11%      | \$9.81               |
| 41-1010  | First-line supervisors/managers of retail sales workers                               | 3,958     | 419           | 11%      | \$17.57              |
| 41-2010  | Cashiers  | 3,828     | 358           | 9%       | \$8.43               |
| 41-9090  | Miscellaneous sales and related workers   | 2,169     | 197           | 9%       | \$7.16               |
| 41-3030  | Securities, commodities, and financial services sales agents                          | 563       | 114           | 20%      | \$11.50              |
| 41-4010  | Sales representatives, wholesale and manufacturing, technical and scientific products | 1,522     | 86            | 6%       | \$21.95              |
| 41-3090  | Sales representatives, services, all other  | 356       | 56            | 16%      | \$14.61              |
| 41-2020  | Counter and rental clerks and parts salespersons                                      | 813       | 36            | 4%       | \$10.52              |
| 41-3010  | Advertising sales agents  | 240       | 27            | 11%      | \$14.93              |

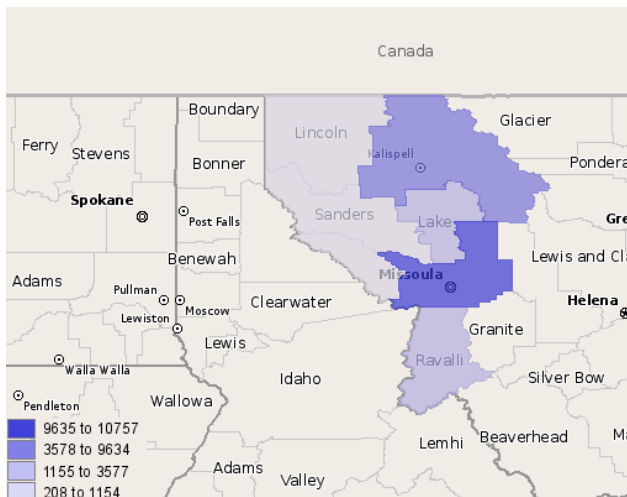
# Office and Administrative Support Occupations

## Highest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 10,757    | 0.96    |
| Flathead, MT (30029) | 8,513     | 0.94    |
| Ravalli, MT (30081)  | 2,332     | 0.78    |
| Lake, MT (30047)     | 1,680     | 0.77    |
| Lincoln, MT (30053)  | 984       | 0.69    |
| Sanders, MT (30089)  | 573       | 0.66    |
| Mineral, MT (30061)  | 208       | 0.64    |
| Western Montana      | 25,046    | 0.89    |
| State                | 83,653    | 0.89    |
| Nation               | 26,011k   | N/A     |

## Growth



| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Flathead, MT (30029) | 866           | 10%      |
| Missoula, MT (30063) | 597           | 6%       |
| Ravalli, MT (30081)  | 250           | 11%      |
| Lake, MT (30047)     | 65            | 4%       |
| Lincoln, MT (30053)  | 63            | 6%       |
| Sanders, MT (30089)  | 59            | 10%      |
| Mineral, MT (30061)  | 35            | 17%      |
| Western Montana      | 1,937         | 8%       |
| State                | 5,649         | 7%       |
| Nation               | 1,703k        | 7%       |

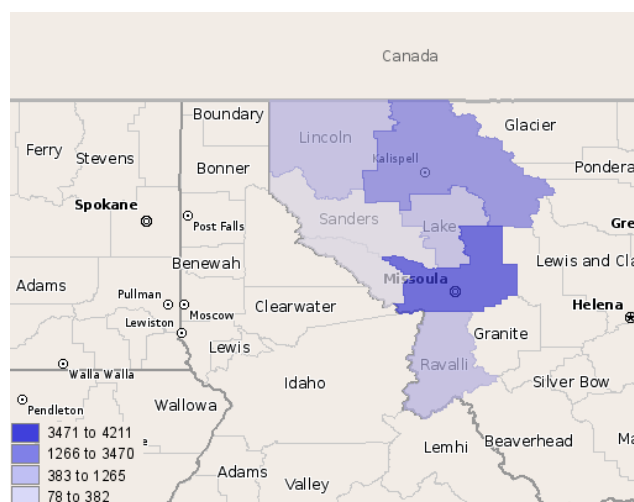
## Highest Growth Occupations

| SOC Code | Name   | 2007 Jobs | 5 Year Growth | % Growth | 2007 Hourly Earnings |
|----------|--|-----------|---------------|----------|----------------------|
| 43-6010  | Executive secretaries and administrative assistants                          | 6,508     | 501           | 8%       | \$12.67              |
| 43-3030  | Bookkeeping, accounting, and auditing clerks                                 | 3,597     | 369           | 10%      | \$12.33              |
| 43-9060  | Office clerks, general   | 2,472     | 229           | 9%       | \$10.95              |
| 43-4050  | Customer service representatives   | 1,265     | 196           | 16%      | \$13.52              |
| 43-4170  | Receptionists and information clerks   | 1,031     | 106           | 10%      | \$10.54              |
| 43-3010  | Bill and account collectors  | 418       | 92            | 22%      | \$13.07              |
| 43-1010  | First-line supervisors/managers of office and administrative support workers | 1,106     | 87            | 8%       | \$16.95              |
| 43-3070  | Tellers  | 783       | 86            | 11%      | \$12.20              |
| 43-4080  | Hotel, motel, and resort desk clerks   | 424       | 68            | 16%      | \$10.11              |
| 43-9020  | Data entry and information processing workers                                | 499       | 29            | 6%       | \$11.22              |



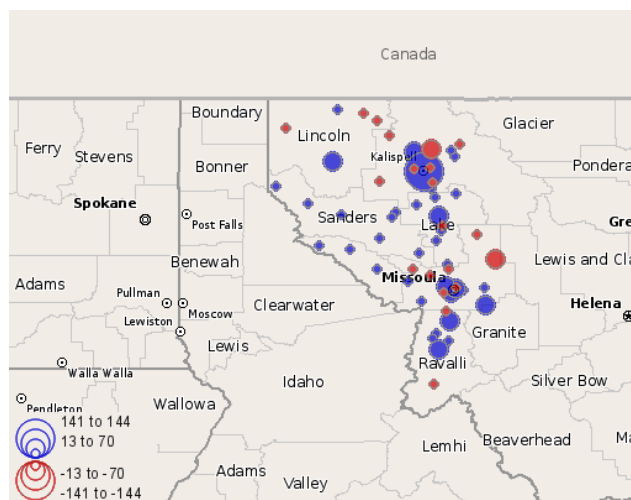
# Transportation and Material Moving Occupations

## Highest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 4,771     | 1.00    |
| Flathead, MT (30029) | 3,214     | 0.82    |
| Ravalli, MT (30081)  | 999       | 0.78    |
| Lake, MT (30047)     | 631       | 0.68    |
| Lincoln, MT (30053)  | 549       | 0.90    |
| Sanders, MT (30089)  | 338       | 0.91    |
| Mineral, MT (30061)  | 145       | 1.03    |
| Western Montana      | 428       | 0.89    |
| State                | 2,082     | 0.91    |
| Nation               | 679k      | N/A     |

## Growth



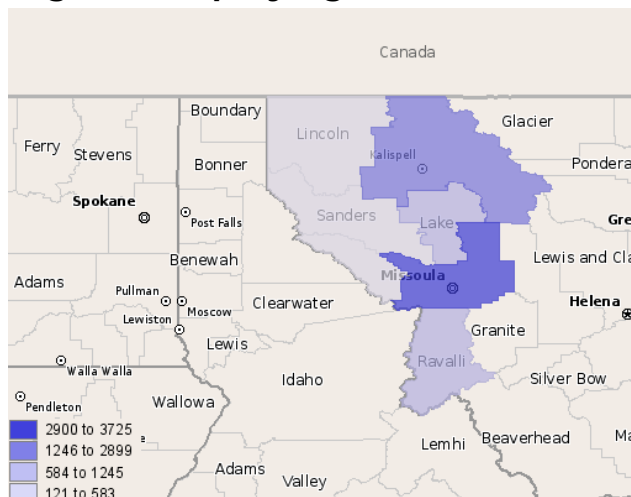
| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Flathead, MT (30029) | 142           | 4%       |
| Missoula, MT (30063) | 90            | 2%       |
| Ravalli, MT (30081)  | 73            | 7%       |
| Lake, MT (30047)     | 34            | 5%       |
| Sanders, MT (30089)  | 34            | 10%      |
| Mineral, MT (30061)  | 29            | 20%      |
| Lincoln, MT (30053)  | 24            | 4%       |
| Western Montana      | 884           | 9%       |
| State                | 2,653         | 8%       |
| Nation               | 926k          | 10%      |

## Highest Growth Occupations

| SOC Code | Name                                      | 2007 Jobs | 5 Year Growth | 2007 Hourly Earnings |
|----------|---|-----------|---------------|----------------------|
| 53-3022  | Bus drivers, school                       | 597       | 83            | \$11.26              |
| 53-3033  | Truck drivers, light or delivery services | 919       | 63            | \$9.93               |
| 53-7061  | Cleaners of vehicles and equipment        | 391       | 42            | \$9.18               |
| 53-6031  | Service station attendants                | 196       | 28            | \$10.24              |
| 53-3031  | Driver/sales workers                      | 755       | 24            | \$11.98              |
| 53-5011  | Sailors and marine oilers                 | 52        | 15            | \$16.74              |
| 53-2012  | Commercial pilots                         | 98        | 15            | \$32.33              |

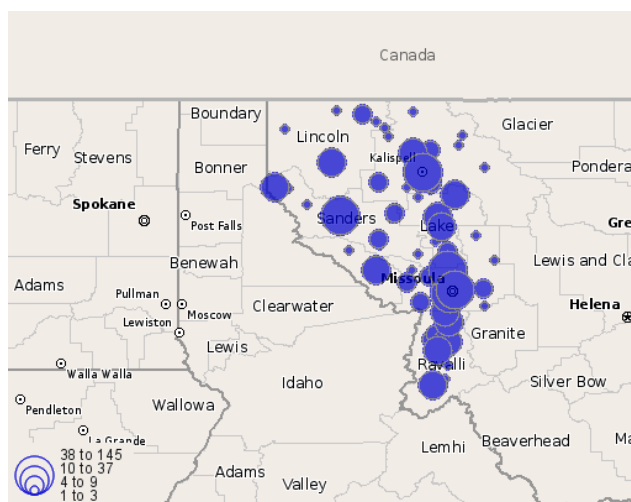
# Education, Training & Library Occupations

## Highest Employing Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 4,192     | 1.02    |
| Flathead, MT (30029) | 2,335     | 0.69    |
| Lake, MT (30047)     | 1,361     | 1.69    |
| Ravalli, MT (30081)  | 922       | 0.83    |
| Lincoln, MT (30053)  | 483       | 0.92    |
| Sanders, MT (30089)  | 448       | 1.4     |
| Mineral, MT (30061)  | 131       | 1.08    |
| Western Montana      | 9,872     | 0.95    |
| State                | 32,392    | 0.93    |
| Nation               | 9,624k    | N/A     |

## Growth



| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 301           | 7%       |
| Flathead, MT (30029) | 250           | 11%      |
| Ravalli, MT (30081)  | 124           | 13%      |
| Sanders, MT (30089)  | 92            | 20%      |
| Lake, MT (30047)     | 59            | 4%       |
| Lincoln, MT (30053)  | 35            | 7%       |
| Mineral, MT (30061)  | 24            | 18%      |
| Western Montana      | 884           | 9%       |
| State                | 2,653         | 8%       |
| Nation               | 926k          | 10%      |

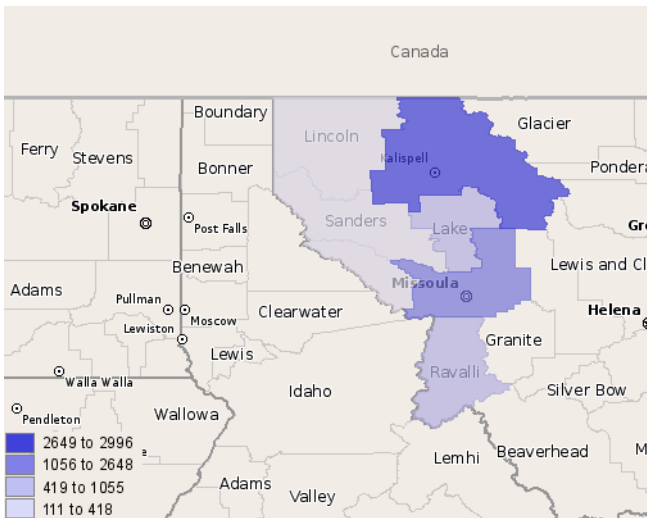
## Highest Growth Occupations

| SOC Code | Name   | 2007 Jobs | 5 Year Growth | % Growth | 2007 Hourly Earnings |
|----------|--|-----------|---------------|----------|----------------------|
| 25-1099  | Postsecondary teachers   | 1,679     | 171           | 10%      | \$27.58              |
| 25-2021  | Elementary school teachers, except special education                       | 1,520     | 157           | 10%      | \$21.69              |
| 25-9041  | Teacher assistants   | 1,203     | 104           | 9%       | \$12.54              |
| 25-2031  | Secondary school teachers, except special and vocational education         | 1,357     | 76            | 6%       | \$23.53              |
| 25-2011  | Preschool teachers, except special education                               | 470       | 72            | 15%      | \$9.22               |
| 25-3099  | Teachers and instructors, all other  | 715       | 64            | 9%       | \$15.87              |
| 25-2022  | Middle school teachers, except special and vocational education            | 398       | 35            | 9%       | \$20.88              |
| 25-3021  | Self-enrichment education teachers   | 191       | 26            | 14%      | \$10.23              |
| 25-2041  | Special education teachers, preschool, kindergarten, and elementary school | 152       | 20            | 13%      | \$22.38              |
| 25-2012  | Kindergarten teachers, except special education                            | 142       | 16            | 11%      | \$22.40              |
| 25-4031  | Library technicians  | 131       | 10            | 8%       | \$11.56              |



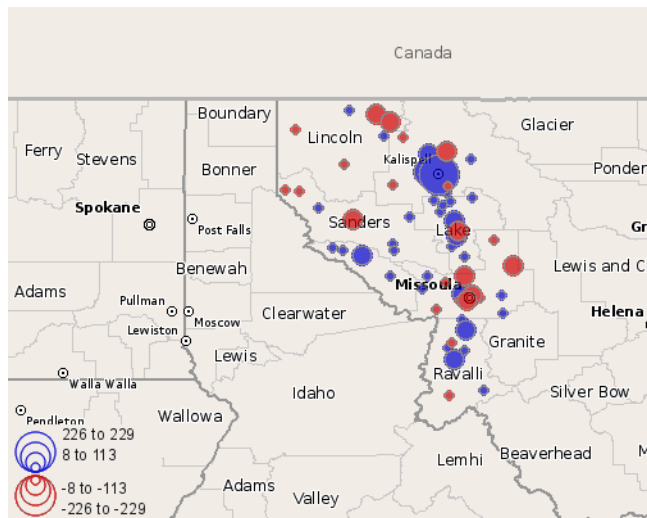
# Production Occupations

## Highest Ranked Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Flathead, MT (30029) | 3,470     | 0.89    |
| Missoula, MT (30063) | 2,660     | 0.55    |
| Ravalli, MT (30081)  | 1,107     | 0.86    |
| Lake, MT (30047)     | 698       | 0.75    |
| Lincoln, MT (30053)  | 420       | 0.69    |
| Sanders, MT (30089)  | 310       | 0.84    |
| Mineral, MT (30061)  | 128       | 0.91    |
| Western Montana      | 8,792     | 0.73    |
| State                | 23,012    | 0.57    |
| Nation               | 11,184k   | N/A     |

## Growth



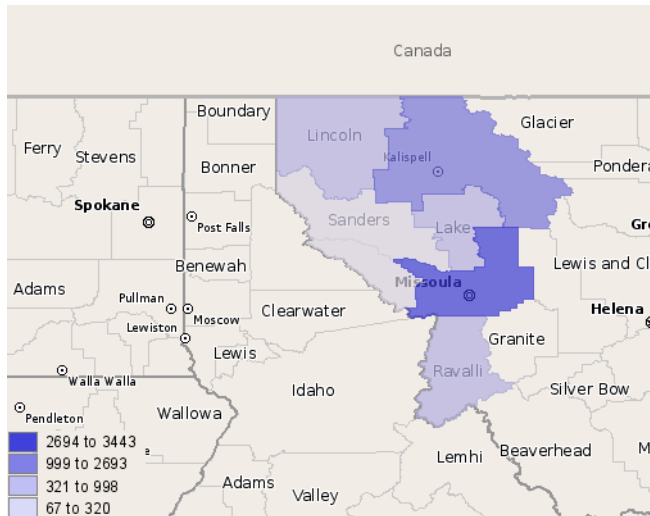
| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Flathead, MT (30029) | 239           | 7%       |
| Ravalli, MT (30081)  | 68            | 6%       |
| Lake, MT (30047)     | 46            | 7%       |
| Mineral, MT (30061)  | 18            | 14%      |
| Sanders, MT (30089)  | -14           | -4%      |
| Lincoln, MT (30053)  | -32           | -8%      |
| Missoula, MT (30063) | -51           | -2%      |
| Western Montana      | 274           | 3%       |
| State                | 1,314         | 6%       |
| Nation               | 169k          | 2%       |

## Highest Growth Occupations

| SOC Code | Name  | 2007 Jobs | 5 Year Growth | % Growth |
|----------|---|-----------|---------------|----------|
| 51-2022  | Electrical and electronic equipment assemblers                      | 257       | 43            | 17%      |
| 51-4121  | Welders, cutters, solderers, and brazers                            | 327       | 34            | 10%      |
| 51-2092  | Team assemblers   | 665       | 34            | 5%       |
| 51-4011  | Computer-controlled machine tool operators, metal and plastic       | 124       | 26            | 21%      |
| 51-3011  | Bakers  | 192       | 22            | 11%      |
| 51-3021  | Butchers and meat cutters   | 180       | 21            | 11%      |
| 51-4041  | Machinists  | 183       | 13            | 7%       |
| 51-6011  | Laundry and dry-cleaning workers                                    | 180       | 12            | 7%       |
| 51-7011  | Cabinetmakers and bench carpenters                                  | 180       | 10            | 5%       |
| 51-1011  | First-line supervisors/managers of production and operating workers | 414       | 8             | 2%       |

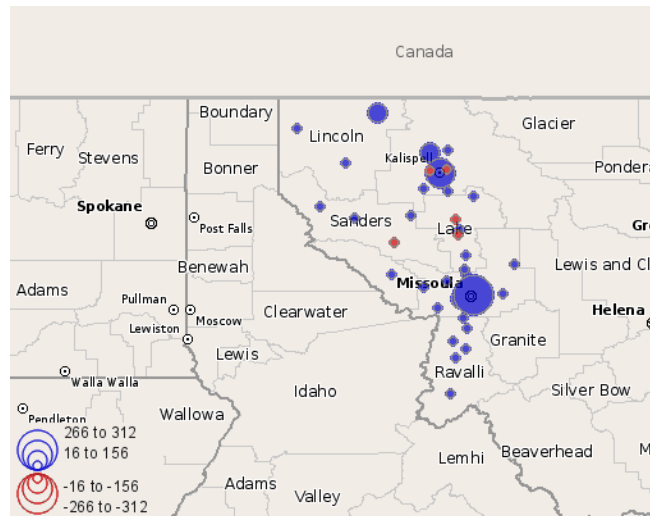
# Healthcare Occupations

## Highest Ranked Occupations



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 4,918     | 0.99    |
| Flathead, MT (30029) | 3,515     | 0.86    |
| Ravalli, MT (30081)  | 1,023     | 0.76    |
| Lake, MT (30047)     | 805       | 0.83    |
| Lincoln, MT (30053)  | 594       | 0.94    |
| Sanders, MT (30089)  | 302       | 0.78    |
| Mineral, MT (30061)  | 114       | 0.78    |
| Western Montana      | 11,271    | 0.90    |
| State                | 38,409    | 0.91    |
| Nation               |           | N/A     |

## Growth



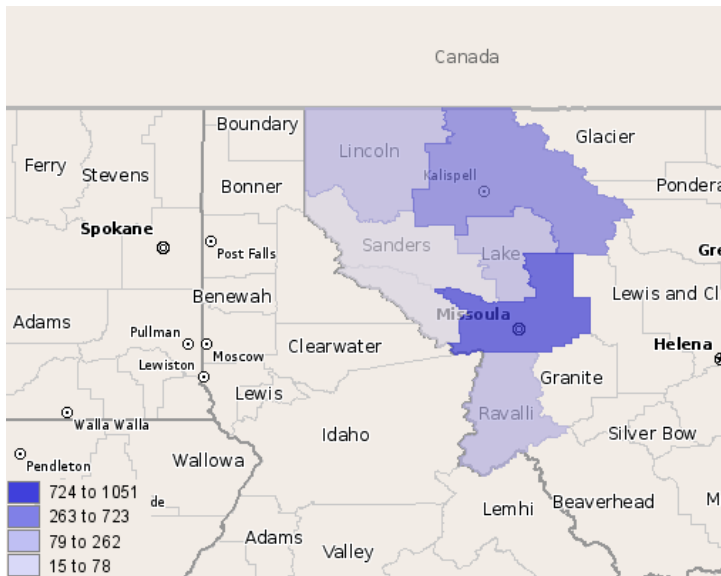
| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 737           | 16%      |
| Flathead, MT (30029) | 462           | 13%      |
| Ravalli, MT (30081)  | 97            | 8%       |
| Lincoln, MT (30053)  | 84            | 11%      |
| Mineral, MT (30061)  | 21            | 14%      |
| Sanders, MT (30089)  | 19            | 5%       |
| Lake, MT (30047)     | (16)          | -3%      |
| Western Montana      | 1,404         | 12%      |
| State                | 4,487         | 12%      |
| Nation               | 1,488k        | 13%      |

## Highest Growth Occupations

| SOC Code | Name  | 2007 Jobs | 5 Year Growth | 2007 Hourly Earnings |
|----------|---|-----------|---------------|----------------------|
| 29-1111  | Registered nurses                                 | 2,184     | 343           | \$24.41              |
| 31-1012  | Nursing aides, orderlies, and attendants          | 1,285     | 153           | \$9.84               |
| 31-1011  | Home health aides                                 | 550       | 120           | \$9.58               |
| 29-1123  | Physical therapists                               | 419       | 82            | \$27.65              |
| 29-2061  | Licensed practical and licensed vocational nurses | 864       | 69            | \$15.17              |
| 29-1051  | Pharmacists                                       | 338       | 60            | \$41.45              |
| 29-2052  | Pharmacy technicians                              | 300       | 60            | \$12.30              |
| 29-1069  | Physicians and surgeons                           | 750       | 44            | \$91.52              |
| 29-2041  | Emergency medical technicians and paramedics      | 218       | 37            | \$10.24              |
| 31-9091  | Dental assistants                                 | 261       | 32            | \$15.52              |
| 31-9092  | Medical assistants                                | 202       | 32            | \$12.19              |

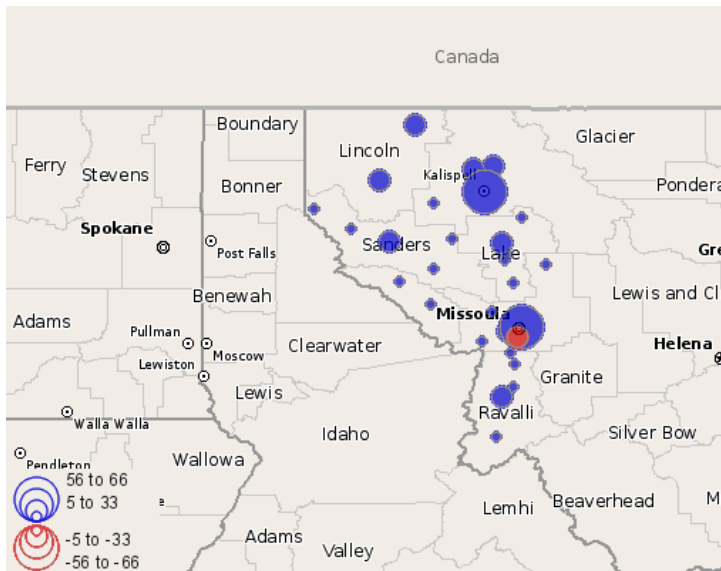
# Community and Social Service Occupations

## Highest Ranked Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 1,214     | 1.18    |
| Flathead, MT (30029) | 559       | 0.67    |
| Lake, MT (30047)     | 167       | 0.83    |
| Ravalli, MT (30081)  | 152       | 0.55    |
| Lincoln, MT (30053)  | 100       | 0.77    |
| Sanders, MT (30089)  | 63        | 0.79    |
| Mineral, MT (30061)  | 19        | 0.64    |
| Western Montana      | 2,274     | 0.88    |
| State                | 8,897     | 1.03    |
| Nation               | 2,394k    | N/A     |

## Growth



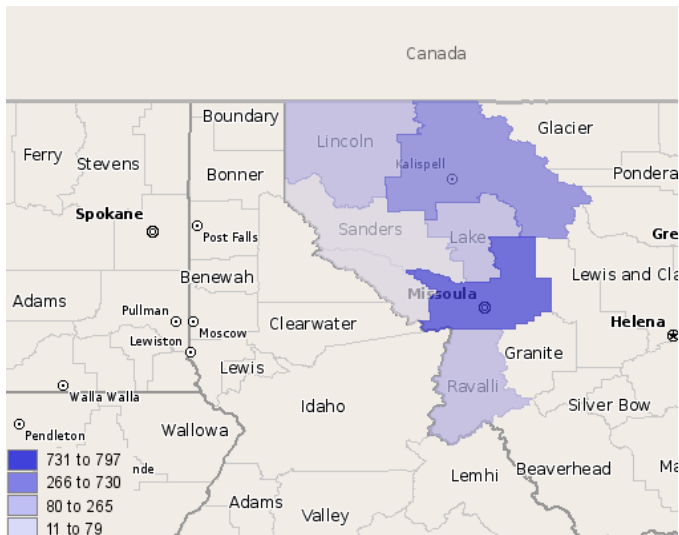
| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Missoula, MT (30063) | 131           | 11%      |
| Flathead, MT (30029) | 121           | 22%      |
| Ravalli, MT (30081)  | 27            | 18%      |
| Lake, MT (30047)     | 21            | 13%      |
| Lincoln, MT (30053)  | 19            | 18%      |
| Sanders, MT (30089)  | 12            | 20%      |
| Mineral, MT (30061)  | 5             | 21%      |
| Western Montana      | 336           | 15%      |
| State                | 1,428         | 16%      |
| Nation               | 262k          | 11%      |

## Highest Growth Occupations

| SOC Code | Name   | 2007 Jobs | 5 Year Growth | 2007 Hourly Earnings |
|----------|--|-----------|---------------|----------------------|
| 21-1093  | Social and human service assistants                | 413       | 70            | \$10.43              |
| 21-1021  | Child, family, and school social workers           | 249       | 39            | \$14.49              |
| 21-2011  | Clergy   | 148       | 30            | \$16.89              |
| 21-1011  | Substance abuse and behavioral disorder counselors | 149       | 25            | \$16.73              |
| 21-1023  | Mental health and substance abuse social workers   | 110       | 25            | \$14.34              |
| 21-1012  | Educational, vocational, and school counselors     | 210       | 19            | \$15.19              |

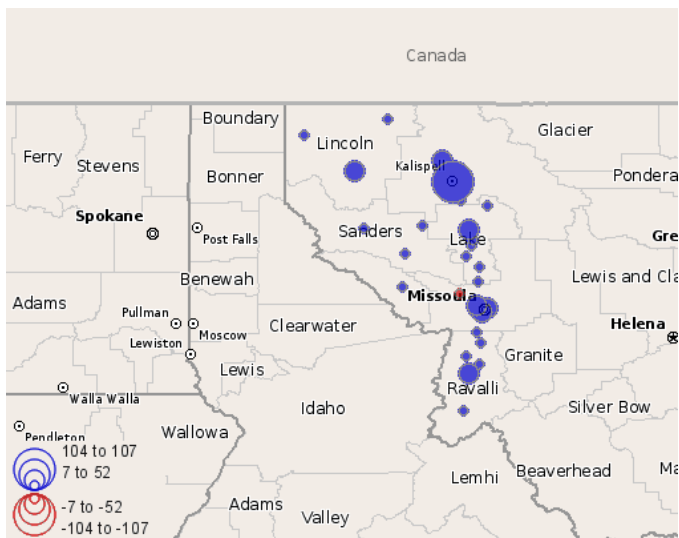
# Architecture & Engineering Occupations

## Highest Ranked Counties



| County               | 2007 Jobs | 2007 LQ |
|----------------------|-----------|---------|
| Missoula, MT (30063) | 910       | 0.76    |
| Flathead, MT (30029) | 790       | 0.81    |
| Ravalli, MT (30081)  | 230       | 0.72    |
| Lake, MT (30047)     | 130       | 0.56    |
| Lincoln, MT (30053)  | 100       | 0.66    |
| Sanders, MT (30089)  | 47        | 0.51    |
| Mineral, MT (30061)  | 13        | 0.36    |
| Western Montana      | 2,219     | 0.74    |
| State                | 7,657     | 0.76    |
| Nation               | 2,788k    | N/A     |

## Growth



| County               | 5 Year Growth | % Growth |
|----------------------|---------------|----------|
| Flathead, MT (30029) | 138           | 17%      |
| Missoula, MT (30063) | 94            | 10%      |
| Ravalli, MT (30081)  | 28            | 12%      |
| Lake, MT (30047)     | 17            | 13%      |
| Lincoln, MT (30053)  | 12            | 12%      |
| Sanders, MT (30089)  | 6             | 12%      |
| Mineral, MT (30061)  | 3             | 24%      |
| Western Montana      | 298           | 13%      |
| State                | 870           | 11%      |
| Nation               | 175k          | 6%       |

## Highest Ranked Occupations

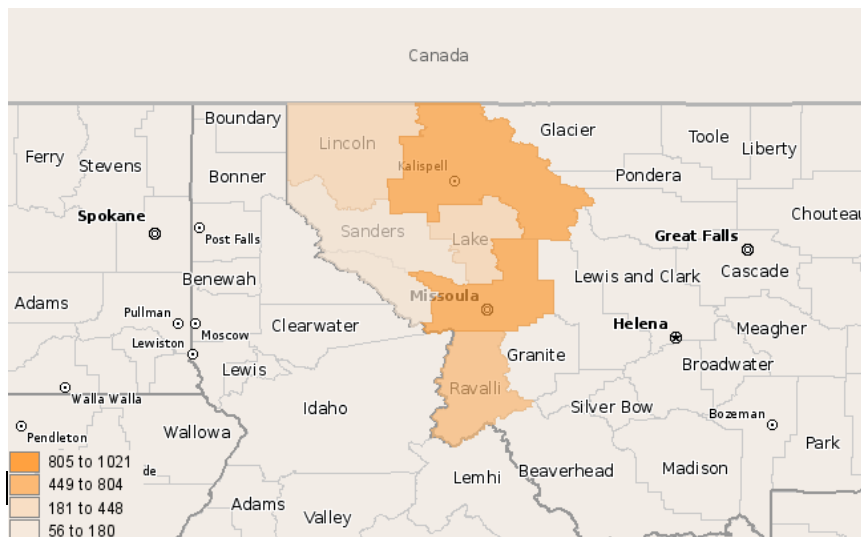
| SOC Code | Name                                   | 2007 Jobs | 5 Year Growth | % Growth | 2007 Hourly Earnings |
|----------|--|-----------|---------------|----------|----------------------|
| 17-3031  | Surveying and mapping technicians      | 212       | 33            | 16%      | \$13.36              |
| 17-1011  | Architects, except landscape and naval | 199       | 32            | 17%      | \$23.18              |
| 17-1022  | Surveyors                              | 172       | 29            | 17%      | \$15.40              |
| 17-2141  | Mechanical engineers                   | 105       | 27            | 27%      | \$28.57              |
| 17-2051  | Civil engineers                        | 241       | 25            | 10%      | \$26.86              |
| 17-2071  | Electrical engineers                   | 115       | 23            | 21%      | \$26.39              |
| 17-3011  | Architectural and civil drafters       | 142       | 13            | 9%       | \$15.25              |
| 17-2081  | Environmental engineers                | 61        | 10            | 17%      | \$23.89              |

## Educational Output

While Workforce Characteristics assessed the strengths of the current workforce, this analysis of regional educational output highlights strengths in the emerging workforce. The emerging workforce is captured by tracking post-secondary completers<sup>25</sup> who received training in key occupational sectors. Program completer data comes from the National Center for Education Statistics. Using a proprietary crosswalk, programs were mapped to specific occupations and aggregated to the sector level.

Research has shown that businesses value close proximity with post-secondary institutions that can supply a trained workforce. At a later stage, stakeholders should consider what programs to add in order to bring supply in line with demand. For now, focus should be given to analyzing the current strengths of the education system and which industries would value existing graduates.

### High School Graduates



| County               | 2006 Graduates | Percent of 15-19 year olds <sup>26</sup> |
|----------------------|----------------|--|
| Flathead, MT (30029) | 1,022          | 18.2%                                    |
| Missoula, MT (30063) | 930            | 12.4%                                    |
| Ravalli, MT (30081)  | 477            | 17.0%                                    |
| Lake, MT (30047)     | 269            | 12.0%                                    |
| Lincoln, MT (30053)  | 252            | 18.7%                                    |
| Sanders, MT (30089)  | 167            | 22.3%                                    |
| Mineral, MT (30061)  | 56             | 23.1%                                    |
| Western Montana      | 3,173          | 15.5%                                    |
| State                | 10,656         | 15.9%                                    |

<sup>25</sup> Students that achieved an award, degree or certificate

<sup>26</sup> This is a relative measure of the graduation percentage of people between the ages of 15-19. A more accurate measure would compare graduation rates to 17-19 year olds, but the population data is too limited for such a measure. There is no ideal percentage for this measure because the entire population is not eligible for graduation, and it may not be evenly distributed among 15-19 year olds.

## High School to College Indicators

### Capture Rates for the Montana University System<sup>27</sup>

This table shows what percentage of high school graduates enter the Montana University System the year after graduation. These numbers do not include Montana's community colleges or tribal colleges.

|               | Fall 2005 | Capture % | Fall 2006 | Capture % | Fall 2007 | Capture % |
|---------------|-----------|-----------|-----------|-----------|-----------|-----------|
| Region total  | 838       | 29%       | 848       | 28%       | 827       | 27%       |
| Flathead      | 145       | 15%       | 181       | 19%       | 200       | 20%       |
| Missoula      | 381       | 40%       | 327       | 36%       | 318       | 36%       |
| Ravalli       | 146       | 34%       | 152       | 32%       | 147       | 35%       |
| All others    | 166       | 22%       | 188       | 26%       | 161       | 23%       |
| Montana Total | 3535      | 33%       | 3291      | 32%       | 3441      | 34%       |

### Remediation<sup>27</sup>

This table displays the percent of students entering the Montana University System between 2005-2007 that required at least one remedial course in Math or English. The averages for Western Montana students are consistently better than the state average and the state average is well above the estimated national average of 51%.<sup>28</sup>

|                 | Fall 2005 | Fall 2006 | Fall 2007 | Three Year Average |
|-----------------|-----------|-----------|-----------|--------------------|
| Western Montana | 30%       | 32%       | 26%       | 30%                |
| Montana         | 33%       | 32%       | 34%       | 36%                |

### Retention Rates<sup>27</sup>

This table displays the percentage of students from Montana high schools that were educated within Montana University System and who persisted to continue their education after their first year at college.

|                 | Fall 2005 | Fall 2006 | Two Year Average |
|-----------------|-----------|-----------|------------------|
| Western Montana | 72%       | 76%       | 74%              |
| Montana         | 75%       | 76%       | 75%              |

<sup>27</sup> Montana Office of Public Instruction, Education Data, "High School Completion and Graduation Rates- Class of 2005", & "High School Completion and Graduation Rates- Class of 2006" <http://www.opi.state.mt.us/>

<sup>28</sup> Average is taken from the National Center for Educational Statistics' *Remedial Education at Degree-Granting Postsecondary Institutions in Fall 2000*. This is the most recent data available, and it is possible that the national averages have changed since 2000 but it is not likely that they have changed by over 20% to meet the Montana averages.

## Postsecondary Indicators

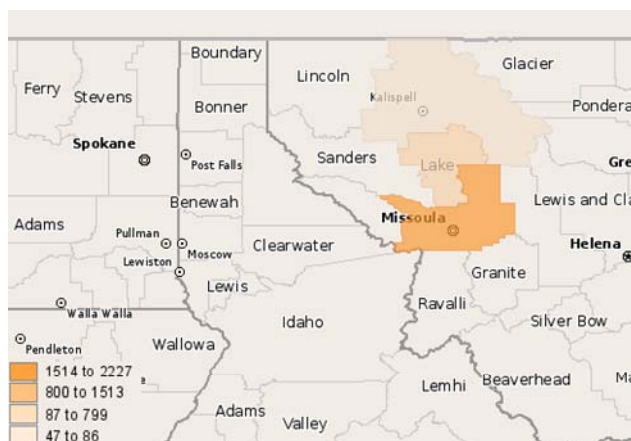
### Regional College Enrollment Rates<sup>29</sup>

Includes data from the three regional public higher-education institutions: the University of Montana, the University of Montana College of Technology and Flathead Valley Community College.

|   | 2005  | 2006  | 2007  | 2008  | % Change<br>2005-2008 | % Change over 10<br>years |
|---|-------|-------|-------|-------|-----------------------|---------------------------|
| Resident Undergraduates                 | 9247  | 9108  | 9102  | 9367  | 1.3%                  | 14.3%                     |
| Resident Graduates                      | 1115  | 1124  | 1140  | 1203  | 7.9%                  | 68.5%                     |
| Resident Total                          | 10362 | 10232 | 10242 | 10570 | 2.0%                  | 18.6%                     |
| Non-Resident Undergraduates             | 1963  | 1968  | 1960  | 1953  | -0.5%                 | -34.7%                    |
| WUE (Western Undergraduate<br>Exchange) | 515   | 597   | 651   | 718   | 39.4%                 | 332.5%                    |
| Non-Resident Graduates                  | 563   | 555   | 551   | 556   | -1.2%                 | 44.4%                     |

## Regional Post-Secondary Program Completers

### Completers by County-2006



| County               | 2006<br>Completions | Completion<br>Percentage |
|----------------------|---------------------|--------------------------|
| Missoula, MT (30063) | 2,573               | ?                        |
| Lake, MT (30047)     | 148                 | ?                        |
| Flathead, MT (30029) | 86                  | ?                        |
| Western Montana      | 2,807               | ?                        |
| Montana              | 7,868               | ?                        |
| Nation               | --                  | ?                        |

<sup>29</sup> Montana University System's High School Follow-up Report, <http://mus.edu/data/HSF-CountyLevelReport.pdf>



## ***Program Completions by Educational Level***

### **Master's Degree and above**

| Program Field                      | 2006 Completions |
|------------------------------------|------------------|
| Health Services                    | 94               |
| Education                          | 84               |
| Social Sciences                    | 80               |
| Business, Management and Marketing | 75               |
| Law                                | 74               |
| Natural Resources                  | 68               |
| Human Services                     | 39               |
| Visual and Performing Arts         | 38               |
| English                            | 35               |
| Physical Sciences                  | 25               |
| Communications and Journalism      | 24               |
| Recreation                         | 17               |
| Biological Science                 | 8                |
| Math                               | 8                |
| Foreign Languages                  | 6                |
| Computer and Information Systems   | 6                |
| Total                              | 553              |

### **Bachelor's Degree**

| Program Field                      | 2006 Completions |
|------------------------------------|------------------|
| Social Sciences                    | 437              |
| Business, Management and Marketing | 351              |
| Natural Resources                  | 150              |
| Communications and Journalism      | 118              |
| Visual and Performing Arts         | 99               |
| Education                          | 94               |
| Biological Science                 | 80               |
| Recreation                         | 65               |
| English                            | 63               |
| Human Services                     | 60               |
| Foreign Languages                  | 48               |
| Physical Sciences                  | 35               |
| Computer and Information Systems   | 15               |
| Health Services                    | 12               |
| Math                               | 12               |
| Total                              | 1,639            |

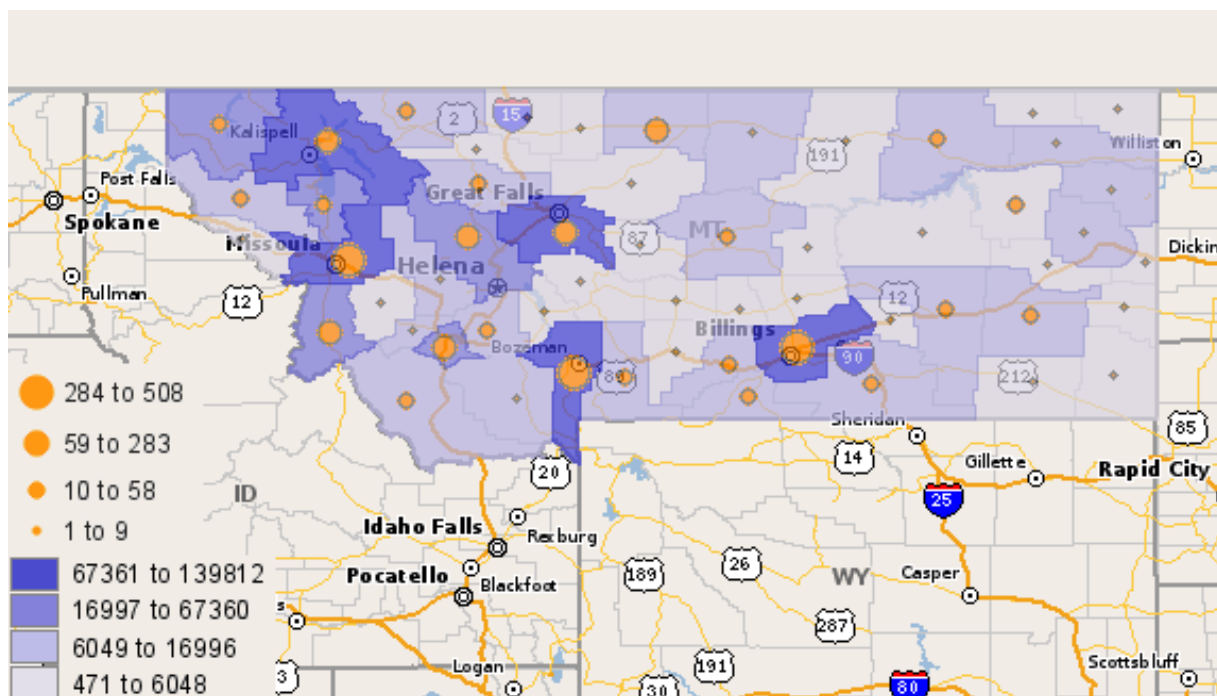
### **Associate's Degrees and Certificates**

| Program Field                      | 2006 Completions |
|------------------------------------|------------------|
| Health Sciences                    | 217              |
| Business, Management and Marketing | 70               |
| Construction Technology            | 44               |
| Computer and Information Science   | 41               |
| Personal Service                   | 36               |
| Law                                | 20               |
| Scientific Technicians             | 19               |
| Transportation and Logistics       | 16               |
| Natural Resources                  | 8                |
| Fine Arts                          | 6                |
| Social Sciences                    | 6                |
| Criminal Justice                   | 3                |
| Child Development                  | 1                |
| Total                              | 487              |



## Post College Settlement Patterns

The map and table below display the settlement patterns of students who graduated from the Montana University system in 2006. The number residing in each county are displayed with the orange graduated symbol. For context the base layer displays the relative population of each county in 2007. Counties where the bubble is larger and the color is lighter indicate a higher concentration of recent college graduates. Counties with a darker base layer and smaller bubbles indicate the opposite, a lower concentration of college graduates. (It should be noted that this data does not include graduates from the state community college system, or tribal colleges. Within the region this will cause concentrations in Flathead and Lake counties to be lower than expected.)



| County                          | 2006 Graduates Montana |
|---------------------------------|------------------------|
| Ravalli, MT (30081)             | 118                    |
| Missoula, MT (30063)            | 637                    |
| Mineral, MT (30061)             | 7                      |
| Flathead, MT (30029)            | 143                    |
| Sanders, MT (30089)             | 12                     |
| Lincoln, MT (30053)             | 14                     |
| Lake, MT (30047)                | 28                     |
| Region Total                    | 959                    |
| State Total                     | 2,964                  |
| Region's Percent of State Total | 32.35%                 |

## Appendix: About the Data

As a data provider, EMSI gathers and harmonize data from 70 state and federal sources, creating in-house a comprehensive and current database that is unsurpassed for its breadth and detail. Industry, workforce, and demographic data are available from state and county levels all the way down to individual ZIP codes. In addition, by combining dozens of data sources, EMSI can fill gaps in individual sources (such as suppressions and missing proprietors)—yielding a composite database that exploits the strengths of each source. Finally, the EMSI database is updated biannually, so the data is the most complete and up-to-date information on the market.

### Select Data Sources

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\_\_\_\_\_. National Population Report.

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\_\_\_\_\_. National Projected Industry data.

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\_\_\_\_\_. Projected National Occupation Matrix.

\_\_\_\_\_. Quarterly Census of Employment and Wages. (also known as ES-202 Covered Employment & Wages Data.)